**Historic, archived document**

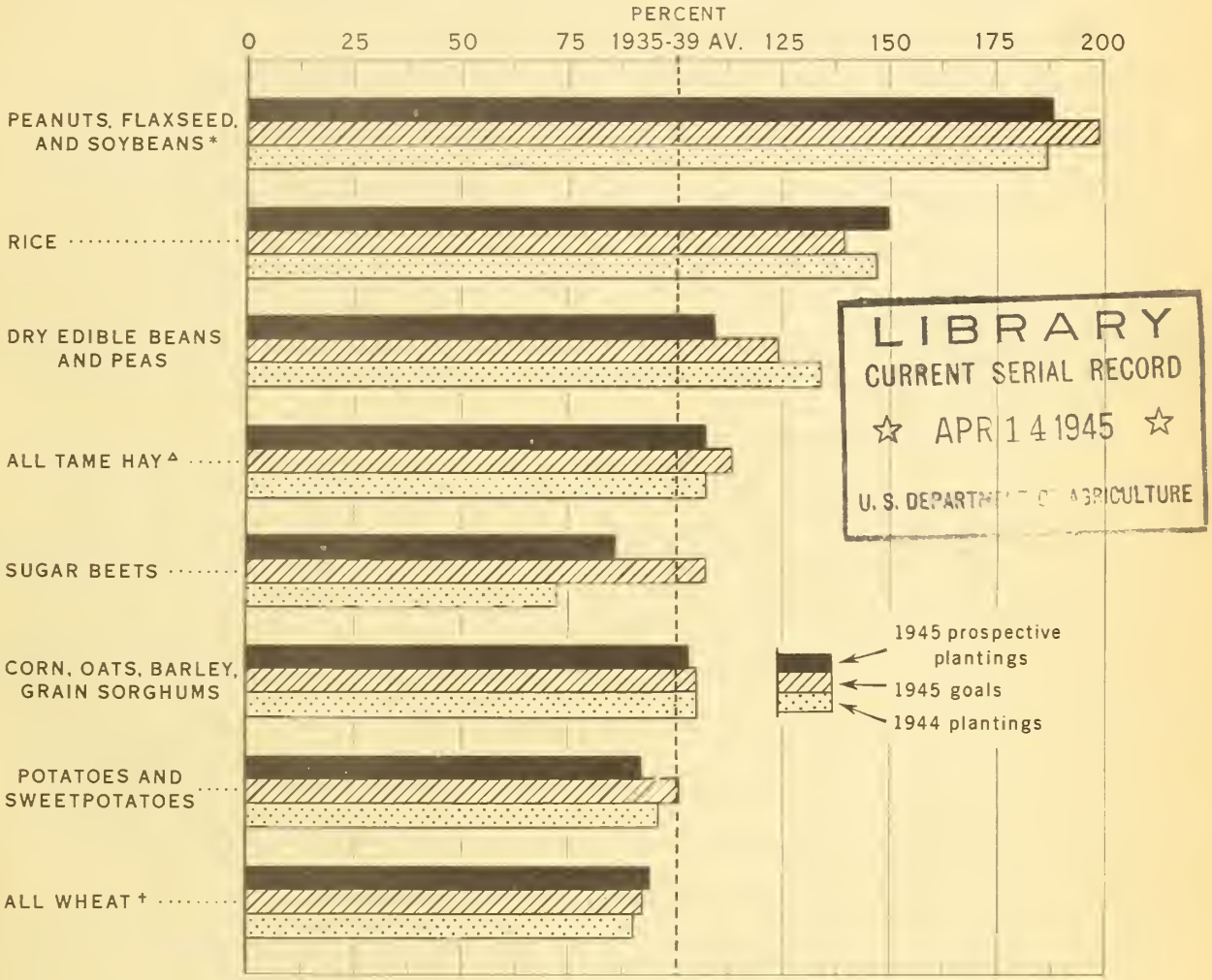
Do not assume content reflects current scientific knowledge, policies, or practices.

# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 24 BAE FEBRUARY - MARCH 1945

## ACREAGES OF PRINCIPAL FIELD CROPS: 1945 PROSPECTIVE PLANTINGS, 1945 GOALS, AND 1944 PLANTINGS COMPARED WITH 1935-39 AVERAGES




LIBRARY
CURRENT SERIAL RECORD
APR 14 1945
U. S. DEPARTMENT OF AGRICULTURE

*INCLUDES GOAL FOR ALL SOYBEANS BASED ON 1944 RATIO OF BEANS TO HAY
△ACREAGE HARVESTED †PROSPECTIVE PLANTING INCLUDES SEEDED WINTER WHEAT ACREAGE

U. S. DEPARTMENT OF AGRICULTURE NEG. 45169 BUREAU OF AGRICULTURAL ECONOMICS

According to the Prospective Plantings Report of March 1, 1945, farmers intended to plant about as large a total acreage in crops as last year, including the winter wheat acreage. The intended acreages of potatoes, sweetpotatoes, beans, dry peas, and peanuts are below the goals as well as below the acreages planted last year. Intended acreages of wheat, rice, and oats, are greater than the goals called for. These acreage data are the first indications of 1945 agricultural production. Changes from March 1 intentions can be and are often made before planting time. Average yields have been unusually high for most crops during the past few years.

# NATIONAL FOOD SITUATION

## SUMMARY

Total civilian food supplies per capita during the next few months will be appreciably below the level of last spring, but as large as the average pre-war level of the 1935-39 period. Prospective supplies of eggs, cereal products, fresh vegetables, apples, citrus fruits, fresh and frozen fish, and fluid milk are large, and sufficient to meet increased demand resulting from substitution for other foods which will be short. Foods which will be particularly short of demand in many sections of the country include meat, poultry, butter, canned fish and canned fruits. Potatoes and rice are expected to be short of civilian demand in some areas, while rationed distribution of the short supplies of canned vegetables, cheese, lard and other fats and oils will continue. Increased Victory Garden production and home canning are needed to supplement commercial supplies of food.

The tight civilian meat supply situation in many areas, paritcularly in large urban centers, during the late winter and spring this year has resulted from the relatively small hog slaughter following a 25 percent decrease in the 1944 spring pig crop compared with 1943 and from heavy Government procurement of meat from federally inspected plants. Only federally inspected meats can be shipped in inter-state commerce. Accordingly, supplies going to those areas normally served by plants slaughtering under federal inspection have been particularly affected by increased Government procurement for war needs.

Civilian egg supplies during the next few months are expected to continue 5 to 10 percent larger than last year despite a decrease in production from last year's record rate because of smaller movement into Government channels. Because of the tight meat situation, the civilian demand for eggs will be higher than a year ago. Poultry meat supplies will continue very short of demand in most metropolitan areas because of reduced production and heavy military procurement.

Supplies of fluid milk for civilian consumption will increase seasonally during the next three months and may exceed last year's record. Consumer demand will be adequate to absorb any likely increase in fluid milk supplies. Somewhat larger quantities of American cheddar cheese will be available than last spring, but current supplies of evaporated milk may be smaller because of war requirements.

Both the total and the civilian supply situations for fats and oils are tighter this spring than they have been at any time during the war. Butter production is still below last year and military requirements are larger than last year. The civilian butter supply situation is not expected to change much in the next 2 or 3 months. Lard supplies are particularly short because of the large decrease in hog slaughter and increased military requirements. Margarine supplies are unusually large, but demand for margarine has accelerated because of smaller supplies of other fats. Civilian supplies of shortening and other edible fats and oils may be about the same for the next 2 or 3 months as last year, but recent reductions in manufacturers' quotas will lower their production later in the year.

Commercial fresh fruit and vegetable supplies in prospect for the next few months appear to be at least as large as last spring's relatively plentiful supplies. However, some increased demands on supplies of such foods emphasize the need for even greater Victory Garden production in 1945.

Cereal products generally are expected to continue plentiful throughout the year, although rice supplies for civilians probably will become short in some areas late this spring and summer. The recent report on farmers' intentions to plant as of March 1, indicated smaller acreages than last year of some food field crops to be planted this spring (see tables 1 and 2). The intended acreages of potatoes, sweetpotatoes, beans, dry peas and peanuts are below the goals as well as below the acreage planted last year. On the other hand, a large acreage of winter wheat was planted last fall and nearly all of it seems to have survived the winter. Allowing for this large acreage of wheat, the intentions report would indicate a total acreage in crops about equal to the large acreage grown last year.

-- March 27, 1945

Table 1.- Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1944 1/

| Year | Source of total food | | | | | Distribution by claimants | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Total food disappearance | Food Production | Imports | Depletion of stocks | Increase in stocks | Civilian | Military | War Food Administration 2/ Net purchases | War Food Administration 2/ Shipments | War Food Administration 2/ Depletion of stocks | War Food Administration 2/ Increase in stocks | Exports and shipments 3/ |
| | Percentage of food disappearance in each year | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.5 | 6.0 | | .5 | 93.7 | 2.1 | 2.5 | 2.3 | | .2 | 1.7 |
| 1942 | 100.0 | 94.1 | 3.8 | 2.1 | | 86.3 | 6.5 | 6.2 | 5.2 | | 1.0 | 1.0 |
| 1943 | 100.0 | 95.6 | 4.7 | | .3 | 79.8 | 10.8 | 8.3 | 7.2 | | 1.1 | 1.1 |
| 1944 | 100.0 | 94.6 | 4.5 | .9 | | 79.8 | 13.2 | 5.7 | 6.3 | .6 | | 1.3 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 114.1 | 107.8 | 6.9 | | .6 | 106.9 | 2.4 | 2.8 | 2.6 | | .2 | 2.0 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.4 | 8.1 | 7.8 | 6.5 | | 1.3 | 1.3 |
| 1943 | 129.4 | 123.7 | 6.1 | | .4 | 103.2 | 14.0 | 10.8 | 9.3 | | 1.5 | 1.4 |
| 1944 | 135.7 | 128.4 | 6.2 | 1.1 | | 108.2 | 18.0 | 7.7 | 8.6 | .9 | | 1.8 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the sources of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year.

2/ The quantities assigned to the War Food Administration are principally food for lend-lease. These quantities are measured in two ways: (1) in terms of War Food purchases from commercial channels, and (2) in terms of shipment out of the country. When measured in terms of purchases, additions to War Food stocks are included. When measured in terms of shipments, additions to stocks are shown separately. War Food Administration shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944, however, shipments exceeded purchases and stocks were decreased.

3/ The 1935-39, 1940 and 1941 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the War Food Administration.

Table 2.- Planted acreage of major crops, 1935-39 average, 1944, goals for 1945 and prospective plantings for 1945, with percentage comparisons

| Commodity | Planted acreage | | 1945 goals | Prospective plantings | Prospective 1945 as percentage of | | |
|---|---|---|---|---|---|---|---|
| | 1935-39 | 1944 | | 1945 1/ | 1935-39 | 1944 | 1945 goal |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Percent | Percent | Percent |
| Total 2/ | 311,346 | 326,594 | 334,874 | 326,482 | 105 | 100 | 97 |
| Corn, all | 97,055 | 98,722 | 99,098 | 95,778 | 99 | 97 | 97 |
| Wheat, all | 73,235 | 65,684 | 67,731 | 68,597 | 94 | 104 | 101 |
| Winter | 51,577 | 46,349 | --- | 49,589 | 96 | 107 | --- |
| Spring, all | 21,659 | 19,335 | --- | 19,008 | 88 | 98 | --- |
| Oats | 40,586 | 42,983 | 44,259 | 46,555 | 115 | 108 | 105 |
| Barley | 13,364 | 14,300 | 13,911 | 12,285 | 92 | 86 | 88 |
| Flaxseed | 1,938 | 3,052 | 5,000 | 4,175 | 215 | 137 | 84 |
| Rice | 1,007 | 1,482 | 1,405 | 1,507 | 150 | 102 | 107 |
| All sorghums | 15,254 | 18,212 | --- | 16,285 | 107 | 89 | --- |
| Sorghums, all, excl. sirup | 15,029 | 18,017 | 17,155 | 16,090 | 107 | 89 | 94 |
| Potatoes | 3,123 | 3,010 | 3,137 | 2,893 | 93 | 96 | 92 |
| Sweetpotatoes | 804 | 777 | 841 | 715 | 89 | 92 | 85 |
| Tobacco 3/ | 1,644 | 1,712 | 1,803 | 1,782 | 108 | 104 | 99 |
| Beans, dry edible | 1,917 | 2,228 | 2,277 | 1,971 | 103 | 88 | 87 |
| Peas, dry field | 281 | 727 | 457 | 427 | 152 | 59 | 93 |
| Soybeans for beans 3/ | 3,042 | 10,502 | 10,757 | 4/10,334 | 340 | 98 | 96 |
| Soybeans grown alone 5/ | 7,262 | 13,564 | --- | 13,236 | 182 | 98 | --- |
| Cowpeas grown alone 5/ | 3,165 | 1,665 | --- | 1,500 | 47 | 90 | --- |
| Peanuts, picked and threshed 3/ | 1,659 | 3,212 | 3,230 | 6/ 3,118 | 188 | 97 | 97 |
| Peanuts, grown alone 5/ | 2,173 | 4,012 | 3,955 | 3,923 | 181 | 98 | 99 |
| Tame hay 3/ | 55,770 | 59,547 | 62,862 | 59,487 | 107 | 100 | 95 |
| Sugar beets | 892 | 639 | 951 | 768 | 86 | 120 | 81 |

1/ From March 1945 Prospective Plantings Report and December 20, 1944 Winter Wheat and Rye Report.
2/ Includes all wheat, soybeans for beans, and peanuts picked and threshed, and excludes soybeans, cowpeas, and peanuts grown alone.
3/ Harvested acreage.
4/ 1945 indicated solid equivalent acreage adjusted for the percentage harvested for beans by using the 1944 percentages, by States.
5/ For all purposes.
6/ Assuming the usual relationship of acreages planted alone to acreages for picking and threshing, by States.

Table 3.- Prospective and actual acreages planted in major crops, 1942-44 with percentage comparisons 1/

| Commodity | 1942 | | | 1943 | | | 1944 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Prospective | Actual | As percentage of prospective | Prospective | Actual | As percentage of prospective | Prospective | Actual | As percentage of prospective |
| | 1,000 acres | 1,000 acres | Percent | 1,000 acres | 1,000 acres | Percent | 1,000 acres | 1,000 acres | Percent |
| Total | 2/279,176 | 2/278,928 | 100 | 290,991 | 292,313 | 100 | 295,355 | 285,967 | 97 |
| Corn, all | 91,348 | 90,552 | 99 | 96,827 | 96,786 | 100 | 99,583 | 98,722 | 99 |
| Spring wheat | 15,287 | 14,155 | 93 | 14,707 | 17,345 | 118 | 19,805 | 19,335 | 98 |
| Oats | 40,377 | 42,595 | 105 | 42,638 | 42,796 | 100 | 46,170 | 42,983 | 93 |
| Barley | 18,208 | 19,536 | 107 | 19,306 | 17,304 | 90 | 15,074 | 14,300 | 95 |
| Flaxseed | 4,037 | 4,715 | 117 | 6,051 | 6,299 | 104 | 4,351 | 3,052 | 70 |
| Rice | 1,454 | 1,483 | 102 | 1,505 | 1,513 | 101 | 1,522 | 1,482 | 97 |
| All sorghums | 17,070 | 16,048 | 94 | 16,594 | 17,530 | 106 | 18,070 | 18,212 | 101 |
| Potatoes | 2,814 | 2,789 | 99 | 3,174 | 3,441 | 108 | 3,180 | 3,010 | 95 |
| Sweetpotatoes | 776 | 710 | 91 | 813 | 907 | 112 | 902 | 777 | 86 |
| Tobacco 3/ | 1,446 | 1,377 | 95 | 1,402 | 1,452 | 104 | 1,716 | 1,712 | 100 |
| Beans, dry edible | 2,412 | 2,098 | 87 | 2,480 | 2,673 | 108 | 2,528 | 2,228 | 88 |
| Peas, dry field | ---- | 519 | --- | 677 | 832 | 123 | 771 | 727 | 94 |
| Soybeans 4/ | 14,085 | 13,879 | 99 | 15,603 | 14,575 | 93 | 14,619 | 13,564 | 93 |
| Cowpeas 4/ | 3,898 | 3,438 | 88 | 2,974 | 2,270 | 76 | 1,835 | 1,665 | 91 |
| Peanuts 4/ | 4,150 | 4,388 | 106 | 5,270 | 5,094 | 97 | 4,704 | 4,012 | 85 |
| Tame hay 3/ | 60,831 | 60,117 | 99 | 60,270 | 60,880 | 101 | 59,910 | 59,547 | 99 |
| Sugar beets | 983 | 1,048 | 107 | 740 | 616 | 83 | 615 | 639 | 104 |

1/ Based on the prospective planted acreages indicated by farmer's reported March 1 intentions.
2/ Excludes acreages of dry field peas since they were not included in Prospective Plantings Report.
3/ Acreage harvested.
4/ Grown alone for all purposes. Partly duplicated in hay acreage.

## Commodity Reviews

### Meats

The current decrease in over-all civilian meat supplies results from the combination of two factors, hog slaughter has been running more than 25 percent below last year's record and military procurement of all meats in the first 6 months of 1945 is scheduled at 30 to 35 percent above the rate of take in the same period of 1944. The disproportionate shortages in the larger cities of the country, particularly those in the Northeast and on the Pacific Coast, are due to distribution problems arising from the fact that the Government procures only federally inspected meats and only such meats can be shipped in interstate commerce. Accordingly, those areas normally served by plants slaughtering under federal inspection (most of these plants are in the mid-west), have had their supplies disproportionately reduced. Furthermore, the total meat production under federal inspection has been cut 22 percent during the first 2 months of this year, compared with January-February, 1944.

On the other hand, a substantial part of the meat supplies for most non-metropolitan areas comes from slaughter by the local butchers and from farm slaughter. Their slaughter has apparently not decreased and in fact may have increased. Practically none of this meat is purchased for non-civilian use.

While the War Food Administration and the Office of Price Administration are attempting to distribute the available meat supplies more equitably, no particular increase in the over-all meat supply for civilians is expected for several months.

Although total meat production in 1945 probably will be 10 percent smaller than the all-time record out-put in 1944 of about 24.7 billion pounds dressed weight, it still will be very large and exceeded only in 1944 and 1943. The heavy reduction in the first 9 months of the year will be principally in pork and reflects the sharp reductions in the spring and fall pig crops of 1944. Hog slaughter for the year probably will be 20-25 percent smaller than in 1944. However, production of pork probably will not be reduced as much as the reduction in numbers slaughered, since market weights of hogs are higher than a year earlier and are about the same as the record weights in early 1943. Pork production throughout the remaining part of the hog marketing year (through September) probably will be about 30 percent smaller than a year earlier, as the reduction in the fall pig crop of 1944 was greater than for the spring crop. While production of lamb and mutton in the first quarter of 1945 appears to have established a record for the period, output in the last 8 or 9 months of the year probably will be lower than in 1944. Larger slaughter in January-March than a year earlier reflected a larger number of lambs fed this season in feed lots and on winter wheat pastures. The early spring lamb crop, largely marketed in April-June is estimated to be 6 percent less than a year earlier and was the smallest crop in 10 years. With a 6 percent reduction from a year earlier in breeding ewe numbers at the beginning of this year, the late crop probably will also be reduced. On the other hand, the slaughter of cattle and calves probably will establish a new record this year, about 35 million head compared with about 34 million in 1944 and an average of 25 million in 1935-39.

Cold-storage stocks of meats in cold-storage warehouses and meat-packing plants declined in February, although stocks are usually built up during this period. Total meat and edible offal stocks on March 1 amounted to 592 million pounds, 25 million less than a month earlier and were 19 million pounds less than the previous low for the month in 1936. March 1 meat stocks were less than one-half as large as the record holdings a year earlier.

Numbers of hogs and sheep on farms at the beginning of this year were sharply reduced from the record numbers a year earlier. Hog numbers decreased from the all-time high of 83.9 million head at the beginning of 1944 to 60.7 million at the end of that year, or 28 percent. Relatively small feed grain supplies and an unfavorable ratio of hog prices to feed grain prices in early 1944 contributed to the reduction. Sheep numbers in 1944 decreased from 51.8 million head to 47.9 million, or 7 percent. The number of cattle on farms and ranches at the first of 1945 was estimated to be 81.8 million head, only 1 percent less than the record number a year earlier.

There was a marked increase in livestock numbers, except for horses, mules, and sheep from the beginning of the war through 1943. Even with the sharp reductions in the number of hogs in 1944, the number on farms at the beginning of 1945 was 38 percent above the average for 1935-39 and cattle numbers were 22 percent higher than the pre-war average.

All of the reduction in cattle numbers in 1944 was in the number of calves and yearling milk heifers. The numbers of all other classes increased. Steer numbers increased 2 percent and the January 1, 1944, number was the highest in 20 years.

Near-record feed grain production in 1944 was large enough to feed the number of livestock on farms at a liberal rate and still leave a larger-than-average carry-over at the end of this feeding year (October 1). If weather conditions are favorable for range land, and if yields equal to the average of recent years are attained from the intended planted acreage of feed grains in 1945, (reported by farmers about March 1) feed grain supplies will be sufficient to sustain a continued large production of livestock and livestock products throughout 1945 and most of 1946.

Poultry and Eggs

Civilian egg supplies during the next few months are expected to continue 5 to 10 percent larger than last year, as they have been for the past few months. Although output may decline 8 to 10 percent from the 1944 record, the reduction in the storing and dehydration of eggs may continue. Dried egg production for the first 2 months of 1945 was less than 2/3 of that in 1944. Only about half as many eggs went into storage in March this year as in March, 1944. Prices are expected to remain at ceilings because of increased substitution of eggs for meats and other protein foods.

Total poultry meat supplies have been at their seasonal low point during February and March. Seasonal increases in the over-all chicken supply this spring will not be available for civilian consumption since most of the increase will be needed to fill military requirements. WFO-125 and its subsequent amendments provide that eviscerators of poultry who process more than 10,000 pounds in any week must set aside such poultry for canning. Canners in turn are required to set aside 100 percent of their production for sale

to the military forces. These orders probably affect the civilian supplies in the Northeastern metropolitan areas and in the Chicago area more than in other parts of the country. Poultry meat is short in other large metropolitan centers also, because the reduced supplies for civilians tend to go to areas nearest to the source of production.

Table 4.- Livestock: Number on farms, January 1, 1935-39 average, and 1941-45 with percentage comparisons

| Items | Average 1935-39 | 1941 | 1942 | 1943 | 1944 | 1945 | 1945 as percentage of 1935-39 | 1945 as percentage of 1944 |
|---|---|---|---|---|---|---|---|---|
| | Million head | Million head | Million head | Million head | Million head | Million head | Percent | Percent |
| All cattle and calves | 66.8 | 71.5 | 75.2 | 79.1 | 82.4 | 81.8 | 122 | 99 |
| Milk cows | 25.0 | 25.5 | 26.4 | 27.1 | 27.7 | 27.8 | 111 | 100 |
| Sheep and lambs | 51.3 | 54.3 | 56.7 | 55.8 | 51.8 | 47.9 | 93 | 92 |
| Hogs | 43.9 | 54.3 | 60.4 | 73.7 | 83.9 | 60.7 | 138 | 72 |
| All chickens | 405.1 | 422.9 | 474.9 | 540.8 | 576.4 | 511.1 | 126 | 89 |
| Chickens, layers | 364.4 | 331.4 | 426.2 | 487.8 | 518.6 | 1/ 469.2 | 129 | 91 |
| Turkeys | 6.0 | 7.3 | 7.6 | 6.7 | 7.6 | 7.5 | 125 | 99 |

1/ Preliminary

Dairy Products

Supplies of fluid milk for civilian consumption will increase seasonally during the next three months and may exceed last year's record. Consumer demand will be adequate to absorb any likely increase in supply of fluid milk. Production of milk on farms is expected to be slightly higher because of a somewhat larger number of cows on farms, a more favorable feed supply situation, and higher unit returns, including dairy production payments.

Total supplies of manufactured dairy products are not much different from last year. However, there is less butter being produced and more cheese and evaporated milk. Along with smaller total butter supplies, civilians are getting a smaller proportion of the total because of very heavy war requirements. The converse is true of cheese, particularly American Cheddar. Production of American Cheddar in the next 3 months is expected to exceed output in both the April-June quarter of 1944 and the first 3 months of 1945. The required set-aside for Government use in April is 50 percent, compared to 55 percent in April, 1944. Evaporated milk production is running some 10 percent above last year, but current civilian supplies appear to be no larger and perhaps they may even be reduced somewhat by increasing war requirements.

Fats and Oils

Civilian supplies of fats and oils are tighter this spring than they have been at any time during the war. Butter production is still below a year ago, but there are some indications that the rate of decrease has slowed down. Civilian supplies will be about the same in the next 3 months as in the January-March period. In order to secure the butter to fill war needs, mostly military, the set-asides for government purchase have been announced by the War Food Administration at 40 percent of production in April and 55 percent in May. These compare with 10 percent in April and 40 percent in May 1944. The 55 percent set-aside for May will be the highest proportion ever required for Government purchase.

With civilian supplies of butter reduced, margarine has moved into civilian trade channels at a record high rate since last August, Tax-paid withdrawals of margarine from manufacturers' for use in the United States including small quantities shipped to United States territories, were 49 million pounds in September (actual weight basis) and more than 50 million pounds each month subsequently. In January, the latest month reported, they reached 59 million pounds. The total for the October-December quarter was 163 million pounds, 11 percent more than a year earlier. January-March withdrawals this year are likely to be 15 to 20 percent larger than in the corresponding period of 1944. Demand for margarine probably will remain strong for several months, at least, because civilian butter supplies are expected to continue smaller than in 1944. Under War Food Order 42 manufacturers' quotas of fats and oils to be used in making margarine for civilians, beginning April 1, will be 120 percent of actual use for this purpose in corresponding quarters of 1944. It is likely that output of margarine for civilians in the remainder of 1945 will be close to the maximum allowed by these quotas.

Civilian lard supplies became increasingly tight in February and early March because of declining output and increased military requirements. Production of lard and rendered pork fat in federally inspected establishments in January and February this year totaled 250 million pounds compared with 525 million pounds a year earlier. The expanded military procurement program includes some lard for civilian food in Europe as well as for direct use of the armed forces.

Total output of lard and rendered pork fat in 1945, including production on farms and in non-inspected establishments, is tentatively forecast at 2,400 million pounds compared with 3,250 million pounds in 1944. In view of the strong export demand for lard this year, as well as the large military requirement, no improvement in civilian supplies of lard is likely for several months at least.

In a recent amendment to War Food Order 42, effective April 1, quotas of fats and oils for the manufacture of civilian shortening and edible oils were reduced from the previous level of 88 percent of average 1940 and 1941 use to 83 percent of such use. Civilian supplies in the April-June quarter may not be much different than a year earlier, when manufacturers were not operating at the full quota level. However, if the reduced quotas are continued, there will be a somewhat smaller output for civilians in the second half of 1945 than in the corresponding period of 1944.

Fruit

The outlook for fresh fruit for civilians this spring is for total supplies slightly larger than last year, including about the same quantity of citrus, more apples and pears, and perhaps less of other deciduous fruits.

Citrus fruits will continue to provide the principal supply of fresh fruits until late spring when new crop cherries, apricots, peaches, plums and other deciduous fruits will become available in considerable volume. The movement of early and midseason oranges from Florida is nearly over and that of Valencia oranges is well under way since the season is several weeks earlier than usual. Large quantities of California Navel oranges are still being marketed, and movement of the western Valencia crop will not start for

a number of weeks. Production of Valencia oranges in Florida and California is now indicated to be about one-eighth larger than comparable production a year ago.

The grapefruit season is well advanced in Florida and Texas, from which come about seven-eights of our production. Market supplies are expected to decline from now until the end of the season next summer. Lemons continue plentiful. Civilian supplies of fresh apples and pears for the next 2 or 3 months are larger than usual because of the heavy carry-over from last year's good crops. Commercial stocks of apples remaining in cold storage March 1 of this year were nearly 80 percent larger than stocks a year earlier and about 25 percent larger than the 5-year (1940-44) average for March 1. Nearly two-thirds of this year's stocks were in the midwestern and eastern states and most of the remainder in the three Pacific Coast States. Because of heavy military procurement in Washington and Oregon, most of the civilian supplies for the rest of this season will have to come from the midwestern and eastern states. Here, a larger percentage of the apples than usual are of small sizes, and some deterioration in quality has occurred. In order to aid the distribution of these apples for consumption, the War Food Administration has recently inaugurated a program under which it will purchase offered quantities of specific grades and sizes up to the capacity of such domestic outlets as the school lunch program, charitable institutions, and other approved groups. Commercial stocks of pears in cold storage March 1 were more than twice as large as a year earlier and nearly one-fifth larger than the 5-year average.

Substantial quantities of fresh strawberries are now moving to market. Production of winter and early spring strawberries is indicated to be much larger this year than last. The greater part of the crop, however, comes from the mid-spring and late spring crops, for which the prospective acreages are expected to be about as large this year as last. If yields come up to average expectations, production would be larger than last year, when yields were quite low.

With average growing conditions for present numbers of deciduous fruit trees, total production in 1945 might be slightly smaller than production in 1944. It is unlikely that the very large crops of apricots, cherries, and peaches of 1944 will be repeated in 1945.

Vegetables

The commercial production of truck crops for fresh market during the first 3 months of 1945 has come within 7 percent of equalling the record large tonnage produced in the corresponding 1944 winter season. Weather conditions on the whole have been fairly satisfactory during February, and early reports as to acreage and production point to somewhat larger supplies. Beets, cabbage, cauliflower, shallots, carrots, and lettuce probably will appear in greater supply this spring than last. These expected increases will be useful in supplementing the short supplies of processed vegetables.

Preliminary reports on commercial truck crops for processing indicate spinach acreages in California and Texas about the same as last year and a 12 percent increase in acreages of green peas to be planted has been indicated for the United States. In order to meet increased military requirements for some canned vegetables, the War Food Administration has increased its acreage goals and support prices for the 4 major truck crops for processing above those

previously announced. The goals for snapbeans are slightly below the 1944 planted acreages, but attempts are being made to increase the acreages of green peas, sweet corn, and tomatoes for processing by 5 to 10 percent over 1944.

Supplies of potatoes from the late fall crop have been generally somewhat short of demand. More lower quality potatoes than usual seem to have been marketed for civilian consumption. In the eastern part of the country, transportation difficulties have slowed down the rate of shipments from Maine so that the available supplies of old potatoes have apparently been spread over a longer period than previously expected. The increased importation of potatoes from Canada has supplemented domestic supplies. Also relatively large supplies of new potatoes are now being shipped from Florida. In the western part of the country, civilian supplies of potatoes have been seriously reduced by very heavy Government purchases for military use in both fresh and processed forms. However, the California crop of new potatoes may start moving to market slightly earlier than last year.

The recent report on farmers' intentions to plant some of the major crops indicate that potato acreages may be 4 percent below last year and some 7 percent below the goals. (See tables 1 and 2) However, the reduction is mostly in low yielding areas. Intended plantings of sweetpotatoes, as of March 1, were 8 percent below the acreages actually planted in 1944 and 14 percent below the goals. The percentage decrease in planned acreages of dry edible beans is somewhat larger than that for sweetpotatoes. However, changes from March 1 intentions can be and are often made before planting time.

Wheat, Rice

The prospects for supplies of cereals in 1945 are again quite favorable. In addition to large stocks of wheat now on hand, a very large wheat crop is indicated for this year. If the yields are about average (1937-42) on the 19 million acres which farmers intended on March 1 to plant in spring wheat, production would be about a quarter billion bushels. A spring crop of this size combined with last December's estimate of 762 million bushel winter wheat crop, would indicate a total wheat production of about a billion bushels. Such a crop would be the third largest in our history although 7 percent less than last year's record crop. It would provide for large exports, heavy domestic food, industrial, and feed use, and still leave a large carry-over at the end of the 1945-46 marketing year.

Civilian per capita consumption of rice in 1944-45 probably will average about the same as in the past few years, (5.7 to 5.8 pounds). A substantial quantity was moved into domestic trade channels before the Government set-aside orders became effective. However, because of the rapid movement into civilian channels this year, shortages in some local markets may become apparent this spring and summer. The crop in 1945 may again turn out to be one of the largest in our history as in 1944, but the demands for military and civilian food in the Orient are expected to be so great that civilian consumption out of the 1945 crop may be considerably below average. On the basis of the intentions reports by growers, a rice acreage of 1.5 million acres is indicated. If an acreage of this size is realized and yields are equal to the average in the past 5 years, the crop would be about the same as in 1944, but half again as large as the 1934-38 average of 46.8 million bushels.

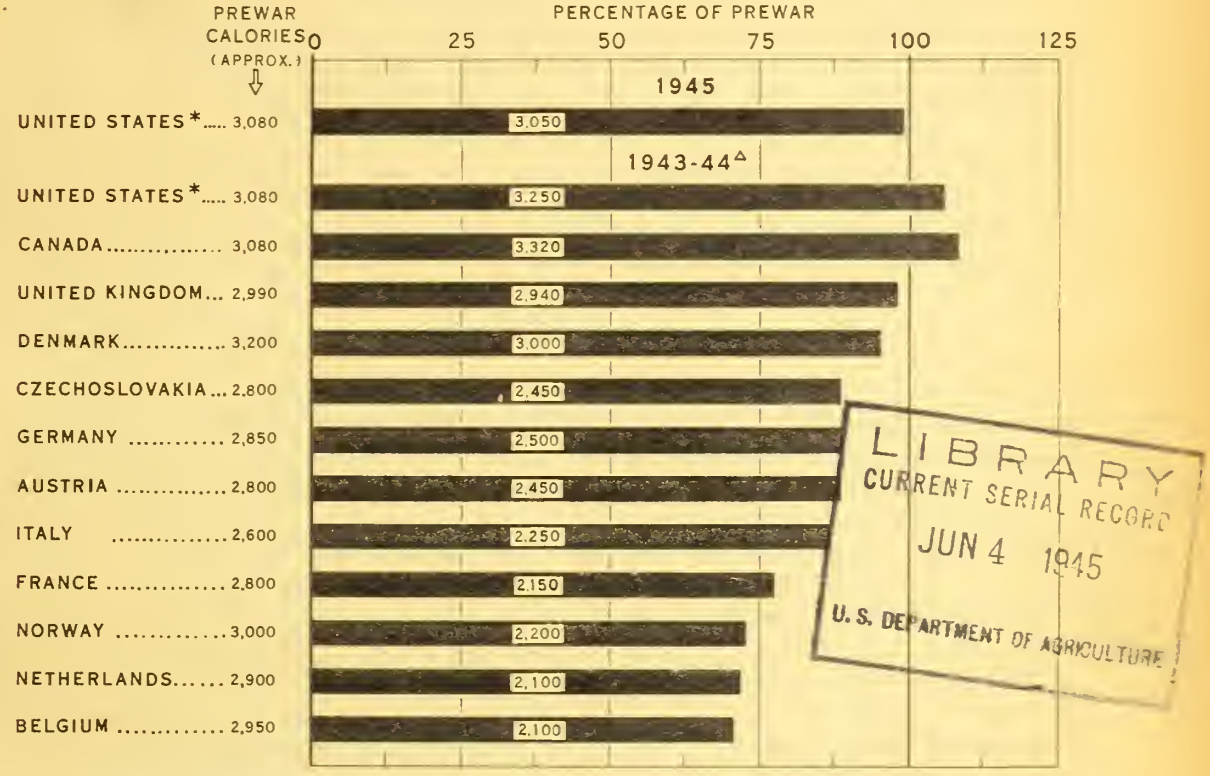
41
F73

# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 25 BAE APRIL - MAY 1945

## COMPARISON OF APPROXIMATE NUMBER OF CALORIES AVAILABLE IN PREWAR AND WARTIME CIVILIAN FOOD SUPPLIES PER PERSON PER DAY, UNITED STATES, CANADA, AND EUROPEAN COUNTRIES




LIBRARY
CURRENT SERIAL RECORD
JUN 4 1945
U. S. DEPARTMENT OF AGRICULTURE

* ABOUT 150 CALORIES LESS THAN TOTAL AS USUALLY COMPUTED IN UNITED STATES.

△ DATA FOR 1943-44 REPRESENT AN AVERAGE FOR THE CALENDAR YEARS 1943 AND 1944 FOR THE UNITED STATES, THE UNITED KINGDOM AND CANADA, AND THE 1943-44 CROP YEAR FOR EACH OF THE OTHER COUNTRIES.

SOURCES: U. K. AND CANADA FROM COMBINED FOOD BOARD, CONTINENTAL EUROPEAN COUNTRIES FROM OFFICE OF FOREIGN AGRICULTURAL RELATIONS.

U S DEPARTMENT OF AGRICULTURE NEG. 45262 BUREAU OF AGRICULTURAL ECONOMICS

Americans and Canadians, individually, have consumed more calories daily during the war than before. Europeans apparently had fewer calories available in 1943-44 than before the war. European supplies decreased further in 1944-45 except, possibly, in the United Kingdom and Soviet Russia. During the war, cereals and potatoes furnished a larger share of the calories in Europe. Supplies of meats, fats and oils, and sugar, were greatly reduced. Destruction of transportation and processing facilities and disorganization of production and distribution controls have been widespread. In 1945-46, Continental Europe will have the least domestically-produced food since the war began. Moreover, owing to maldistribution within the countries, European farmers may be consuming 25 to 30 percent more than nonfarm people. (See Tables 5, 8, 10 and 11).

# THE NATIONAL FOOD SITUATION

## In This Issue


| | Page |
|---|---|
| General Summary | 3 |
| Nutritive Outlook for 1945 | 9 |
| Commodity Reviews | 9 |
| a. Meats | 9 |
| b. Poultry and Eggs | 12 |
| c. Dairy Products | 14 |
| d. Fats and Oils | 16 |
| e. Fruits | 19 |
| f. Vegetables | 21 |
| g. Sugar | 22 |
| h. Food Grains | 25 |
| The 1945 Fish Supply Situation | 26 |
| Production and Consumption of Canned Soups and Canned Baby Foods, 1935-45 | 31 |


## List of Tables


| Table | | |
|---|---|---|
| 1. | Volume of production for sale and farm home consumption | 5 |
| 2. | Apparent civilian consumption of major food commodities | 6 |
| 3. | Total food disappearance: Source and distribution, 1935-45 | 8 |
| 4. | Estimated meat production | 10 |
| 5. | Consumption of meat, poultry and fish in the United States, Canada, and European countries | 13 |
| 6. | Cold storage holdings of eggs | 14 |
| 7. | Production of milk and principal manufactured dairy products | 16 |
| 8. | Consumption of milk in the United States, Canada, and European countries | 17 |
| 9. | Estimated production of primary fats and oils from domestic materials | 18 |
| 10. | Consumption of fats and oils in the United States, Canada, and European countries | 20 |
| 11. | Consumption of sugar in the United States, Canada, and European countries | 24 |
| 12. | Supplies of canned salmon in retail stores | 28 |
| 13. | Canned baby foods and soups: Supply and distribution | 32 |
| 14. | Production of major food commodities | 33 |
| 15. | Retail food prices | 35 |

## SUMMARY

The over-all food supply for civilians in 1945 will be from 5 to 7 percent smaller, on a per capita basis, than last year's record consumption--but about 2 to 4 percent above the average level in 1935-39. Civilian demand will continue to be unusually strong. Difficulties of distributing the smaller supplies of some foods among civilians will be increased. Prospective food supplies are large enough to meet somewhat larger non-civilian requirements than in 1944 and still maintain a higher level of civilian consumption than in the pre-war years. Fruits and vegetables produced in town and city gardens are not included in these estimates of civilian supplies. Victory Garden production is expected to contribute materially in keeping the 1945 nutrition level above that of the pre-war period, 1935-39.

Production of food crops and livestock for sale and farm home consumption in 1945, on the basis of present indications, will be about 32 percent above production in 1935-39, but about 5 percent less than the 1944 record. The principal reduction from 1944 will be in slaughter of meat animals. In 1944, some of our total food supply came from accumulated stocks, but little further reduction in stocks is possible this year. Imports have furnished less than 5 percent of our food since we entered the war, and the import situation is not expected to improve very much this year.

The reduction in over-all civilian food supplies from last year comes principally in the supplies of pork, lard, butter, other fats and oils, sugar, and canned fish. Smaller supplies of these foods greatly increase the problems involved in their distribution throughout the country. Larger non-civilian requirements than in 1944 are in prospect this year for canned fruits and vegetables, evaporated milk, and chicken,

so supplies of these foods may be somewhat shorter. On the other hand, supplies of many foods which are important because of their nutritive content, their variety and their quantity will be at least as large as last year, although demand for some of these will be stronger, particularly for eggs. Among the items in larger supply than last year are eggs, fluid milk, skim milk byproducts, commercial supplies of some fresh vegetables, canned fruit juices, fresh and frozen fish, and the grain products with exception of rice in some areas.

For most of the foods, civilian supplies of which are expected to be less in 1945 than in 1944, per capita supplies will be about as large as in the pre-war years, 1935-39. Major exceptions are butter, canned fish, and sugar,--per capita supplies of which will be considerably below pre-war levels. Current indications are that per capita meat supplies will be only slightly under 1935-39. From the nutritional standpoint, the increased consumption since 1935-39 of fresh vegetables, fluid milk, eggs, canned fruit juices, citrus fruit, and whole grain and enriched cereal products will provide more of the essential nutrients except calories than will be lost through reductions in other foods, compared with pre-war years. Prospective food supplies will be more than adequate in all parts of the United States to meet all essential food needs according to present dietary standards.

-- May 7, 1945

Table 1.- Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1942, 1943, 1944, and forecasts for 1945 with percentage comparisons.

(Index numbers, 1935-39 = 100)

| Item | 1942 | 1943 Revised | 1944 1/ | 1945 (forecast) 2/ | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|
| Food grains 3/ | 139 | 116 | 148 | 140 | 95 |
| Truck crops 4/ | 129 | 124 | 135 | 137 | 101 |
| Fruits and nuts 5/ | 117 | 107 | 123 | 122 | 99 |
| Vegetables, excluding truck crops 6/ | 104 | 125 | 106 | 105 | 99 |
| Sugar crops 7/ | 110 | 81 | 82 | 92 | 112 |
| Total food crops 8/ | 124 | 116 | 129 | 126 | 98 |
| Meat animals 9/ | 132 | 150 | 155 | 141 | 91 |
| Poultry 10/ | 131 | 152 | 153 | 145 | 95 |
| Dairy products 11/ | 114 | 113 | 116 | 117 | 101 |
| Total food livestock | 126 | 138 | 141 | 134 | 95 |
| Total food production | 125 | 132 | 138 | 132 | 96 |
| Total agricultural production | 124 | 128 | 136 | 127 | 93 |
| Civilian per capita food consumption | 107 | 106 | 110 | 102-104 | 93-95 |

1/ Preliminary.
2/ Production indexes for 1945 are forecasts. Crops estimates are based on acreage farmers intended in March to plant and average yields, as described in the March Prospective Plantings report. Livestock estimates are based on preliminary indications of marketings and home consumption of livestock and livestock products for the calendar year 1945.
3/ Includes wheat, rye, rice, and buckwheat.
4/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for manufacture (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
5/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
6/ Includes dry edible beans, potatoes, sweetpotatoes.
7/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
8/ Includes peanuts in addition to the other crops.
9/ Includes cattle and calves, sheep and lambs, and hogs.
10/ Includes eggs, chickens, turkeys, and broilers.
11/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943 1944, 1945, with percentage comparisons 1/

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 | 1945 as a percentage of 1935-1939 | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Percent | Percent |
| Meats (dressed weight) | | | | | | | |
| Beef | 54.8 | 61.2 | 49.6 | 55.1 | | | |
| Veal | 8.0 | 8.0 | 7.9 | 11.2 | | | |
| Lamb and mutton | 6.7 | 7.2 | 6.4 | 6.6 | | | |
| Pork (excluding lard) | 56.1 | 61.5 | 72.4 | 76.6 | | | |
| Total meats | 125.6 | 137.9 | 136.3 | 149.5 | 120-125 | 96-100 | 80-84 |
| Poultry Products | | | | | | | |
| Eggs 2/ | 37.3 | 38.9 | 43.1 | 43.9 | 45.8 | 123 | 104 |
| Chicken (dressed weight) | 17.9 | 21.5 | 28.0 | 23.6 | 20.5 | 115 | 87 |
| Turkey (dressed weight) | 2.6 | 3.7 | 3.4 | 3.3 | 3.6 | 138 | 109 |
| Dairy Products | | | | | | | |
| Total milk (milk equivalent) | 801 | 838 | 765 | 789 | 757 | 95 | 96 |
| Cheese | 5.5 | 6.3 | 5.0 | 5.0 | 4.8 | 87 | 96 |
| Cond. and Evap. milk | 16.7 | 18.3 | 18.6 | 16.2 | 15.5 | 93 | 96 |
| Fluid milk and cream | 340 | 372 | 403 | 423 | 429 | 126 | 101 |
| Fats and Oils | | | | | | | |
| Butter, farm and factory | 16.7 | 15.6 | 11.8 | 11.9 | 10.3 | 62 | 87 |
| Lard | 11.0 | 13.6 | 14.5 | 13.9 | | | |
| Margarine (fat content) | 2.3 | 2.2 | 3.1 | 3.1 | | | |
| Shortening (fat content) | 11.7 | 8.9 | 9.7 | 9.1 | | | |
| Other edible fats and oils (fat content) | 6.3 | 7.7 | 6.5 | 6.7 | | | |
| Total fats and oils 3/ | 48.0 | 48.0 | 45.6 | 44.7 | 38-40 | 79-83 | 85-89 |
| Total, all fat content | 44.7 | 45.0 | 43.3 | 42.4 | 36-38 | 81-85 | 85-90 |
| Fruits | | | | | | | |
| Fresh | | | | | | | |
| Citrus | 48.8 | 57.0 | 59.6 | 68.0 | 68 | 139 | 100 |
| Apples (commercial) | 30.2 | 26.7 | 25.2 | 27.5 | 78 | 87 | 96 |
| Other (excluding melons) | 59.2 | 46.1 | 36.2 | 54.1 | | | |
| Total Fresh | 138.2 | 129.8 | 121.0 | 149.6 | 146 | 106 | 97 |
| Processed | | | | | | | |
| Canned fruit | 14.9 | 16.3 | 12.2 | 10.2 | 9.5 | 64 | 93 |
| Canned juices | 4.1 | 6.8 | 6.6 | 10.1 | 10.4 | 254 | 103 |
| Frozen | 4/ .7 | 1.6 | 1.3 | 1.9 | 2.2 | 314 | 116 |
| Dried | 5.6 | 4.5 | 5.9 | 5.7 | 4.1 | 73 | 72 |
| Vegetables | | | | | | | |
| Fresh | 235 | 251 | 236 | 253 | 251 | 107 | 99 |
| Canned | 31.1 | 38.7 | 33.7 | 33.5 | 28-30 | 90-96 | 84-90 |
| Frozen | .4 | 1.0 | .7 | 1.6 | 1.5 | 375 | 94 |
| Potatoes | 130 | 118 | 134 | 119 | 116 | 89 | 97 |
| Sweetpotatoes | 23.3 | 19.6 | 21.6 | 20.9 | 17 | 73 | 81 |
| Beans, dry edible | 8.8 | 9.1 | 8.7 | 8.7 | 7-8 | 80-91 | 80-92 |
| Canned soups & baby foods | 5.2 | 8.5 | 6.9 | 8.8 | 9.4 | 181 | 107 |
| Sugar (refined) | 96.5 | 86.2 | 80.3 | 89.0 | 72 | 75 | 81 |

Table 2.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943, 1944, 1945 with percentage comparisons - continued

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 | 1945 as a percentage 1935-1939 | 1945 as a percentage 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pound | Percent | Percent |
| Grains | | | | | | | |
| Corn products: | | | | | | | |
| Corn meal | 23.9 | 21.8 | 22.6 | 22.6 | 22.6 | 95 | 100 |
| Corn sirup (Rev.) | 7.7 | 14.3 | 12.5 | 13.4 | 13.8 | 179 | 103 |
| Corn starch (Rev.) | 1.3 | 1.7 | 1.8 | 1.4 | 1.4 | 108 | 100 |
| Corn sugar (Rev.) | 3.2 | 5.5 | 5.0 | 4.6 | 5.0 | 156 | 109 |
| Breakfast food | 1.7 | 2.5 | 2.6 | 2.5 | 2.6 | 153 | 104 |
| Hominy | 1.2 | 1.8 | 1.8 | 1.8 | 1.7 | 142 | 94 |
| Oats | | | | | | | |
| Oatmeal (Rev.) | 3.9 | 3.4 | 4.2 | 3.3 | 4.3 | 110 | 130 |
| Barley | | | | | | | |
| Barley food products 5/ | 5/1.2 | 1.4 | 1.5 | 1.5 | 1.5 | 125 | 100 |
| Wheat | | | | | | | |
| Flour 6/ (Rev.) | 153.1 | 155.7 | 161.3 | 161.0 | 162.0 | 106 | 101 |
| Breakfast food (Rev.) | 3.7 | 3.8 | 3.7 | 3.7 | 3.8 | 103 | 103 |
| Rye | | | | | | | |
| Rye flour (Rev.) | 2.2 | 2.7 | 3.3 | 2.8 | 2.5 | 114 | 89 |
| Rice milled | 5.7 | 5.7 | 5.8 | 5.8 | 5.7 | 100 | 98 |
| Beverages | | | | | | | |
| Coffee 7/ | 14.0 | 13.4 | 13.1 | 16.0 | 16.2 | 116 | 101 |
| Tea | .67 | .53 | .46 | .53 | .66 | 99 | 125 |
| Cocoa | 4.4 | 3.8 | 2.9 | 3.5 | 3.4 | 77 | 97 |
| Peanuts (shelled) | 4.7 | 6.9 | 6.3 | 6.2 | 6.2 | 132 | 100 |

Population estimates used to obtain per capita consumption figures are official census estimates of total population adjusted for under-enumeration of children under 5 less 85 percent of military personnel. It is assumed that approximately 15 percent of the military personnel consume food obtained through civilian distribution channels. 1/ Data for 1944 are preliminary and those for 1945 indications. Calendar year basis except for canned fruits, canned vegetables, and dried fruits which are on a pack year basis; potatoes and sweetpotatoes which are on the basis of a year beginning July 1; fresh citrus fruits, peanuts and dry edible beans on a crop-year basis, rice on an August 1 year. All years begin in the year designated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. For more detailed explanation see footnotes Table 14. 2/ In terms of number of eggs the apparent per capita consumption was 298 in 1935-39, 311 in 1942, 345 in 1943, 351 in 1944, and 366 in 1945. 3/ Includes actual weight of butter, fat content of other items. 4/ Average 1937-39. Data prior to 1937 are not available. 5/ All barley food products in terms of malt equivalent. 6/ Includes white, whole wheat, and Semolina flour. 7/ Green bean basis.

Table 3.- Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1945 1/

| Year | Source of total food | | | | | Distribution by claimants | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Total food disappearance | Food production | Imports | Depletion of stocks | Increase in stocks | Civilian | Military including military relief feeding | War Food Administration 2/ Net purchases | War Food Administration 2/ Shipments | War Food Administration 2/ Depletion of stocks | War Food Administration 2/ Increase in stocks | Exports and Shipments 3/ |
| | Percentage of food disappearance in each year | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.5 | 6.0 | | .5 | 93.7 | 2.1 | 2.5 | 2.3 | | .2 | 1.7 |
| 1942 | 100.0 | 94.1 | 3.8 | 2.1 | | 86.3 | 6.5 | 6.2 | 5.2 | | 1.0 | 1.0 |
| 1943 | 100.0 | 95.6 | 4.7 | | .3 | 79.8 | 10.8 | 8.3 | 7.2 | | 1.1 | 1.1 |
| 1944 | 100.0 | 94.5 | 4.8 | .7 | | 80.4 | 12.8 | 5.5 | 6.2 | .7 | | 1.3 |
| 1945 (forecast) | 100.0 | 94.3 | 5.4 | .3 | | 77.3 | 16.4 | 4.8 | 5.8 | 1.0 | | 1.5 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 114.1 | 107.8 | 6.9 | | .6 | 106.9 | 2.4 | 2.8 | 2.6 | | .2 | 2.0 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.4 | 8.1 | 7.8 | 6.5 | | 1.3 | 1.3 |
| 1943 | 129.4 | 123.7 | 6.1 | | .4 | 103.2 | 14.0 | 10.8 | 9.3 | | 1.5 | 1.4 |
| 1944 | 136.9 | 129.4 | 6.5 | 1.0 | | 110.1 | 17.5 | 7.5 | 8.5 | 1.0 | | 1.8 |
| 1945 (forecast) | 131.1 | 123.6 | 7.1 | .4 | | 101.3 | 21.5 | 6.3 | 7.6 | 1.3 | | 2.0 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantites weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year.

2/ The quantities assigned to the War Food Administration are principally food for lend-lease. These quantities are measured in two ways: (1) in terms of War Food purchases from commercial channels, and (2) in terms of shipment out of the country. When measured in terms of purchases, additions to War Food stocks are included. When measured in terms of shipments, additions to stocks are shown separately. War Food Administration shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940 and 1941 exports and shipments are strictly commercial. For the war years, they approximate the commercial [illegible]

## The Nutritive Outlook for 1945 1/

The civilian levels of nutrition in 1945 will be generally above the pre-war level, although somewhat below 1944, according to present indications of per capita food supplies, including both commercial and Victory Garden production. The reduction in supplies of sugar, fats and oils, and meats, compared with 1944, will cut the number of calories 5 to 10 percent unless people eat more grain products than now seems probable. Supplies of niacin and thiamine will be about 10 percent less than last year, largely because of the cut in pork supplies. Quantities of other nutrients available in 1945 probably will be about equal to those of 1944.

The supply of food energy or calories will be practically as large as in 1935-39 because of the expected increased consumption of milk, grain products, and eggs, compared with pre-war levels. The number of calories available to civilians is expected to average 3,200 per person per day, as usually calculated in the United States with allowances for moderate loss in preparation, (3,050 as calculated in some other countries). This is above any recognized standard requirement for the average of the whole civilian population. The National Research Council in 1941 recommended daily allowances over 3,000 calories only for very active men and for boys from 13 to 20. A rough average requirement for the entire United States civilian population with allowance for moderate kitchen waste, is 2,700 to 2,800 calories. Part of the margin between the 3,200 calorie supply and this requirement is lost through excessive table and kitchen waste.

The general improvement in the nutrition outlook for the war year 1945 over the pre-war years, 1935-39, is largely due to the 26 percent increase in fluid milk consumption, the enrichment of grain products, and the increased consumption of green and yellow vegetables, tomatoes and citrus fruits. Principally as a result of the heavy fluid milk consumption, protein supplies are 10 percent above pre-war, and calcium 20 percent. Both milk and the enrichment of cereal products contribute to the increase of about a third in the per capita supply of riboflavin. The enrichment program has also been important in making available, on the average, a fourth more iron and niacin and a third more thiamine (Vitamin B-1) than in 1935-39. The increased supplies of citrus, tomatoes, and green and yellow vegetables in 1945 compared with pre-war years will supply 10 percent more Vitamin A and 30 percent more ascorbic acid (Vitamin C), than the averages for 1935-39. Greater production of green and yellow vegetables and tomatoes in Victory Gardens and extension home canning are particularly important in supplying these vitamins.

## COMMODITY REVIEWS

### Meats

Per capita civilian meat supplies will not change greatly during the late spring and summer from the present tight situation for the country as a whole. However, some improvement in distribution between areas may result from recently instituted governmental program.

It now appears that civilian per capita meat consumption during the first quarter of 1945 was slightly above the pre-war (1935-39) annual rate of 126 pounds, compared with the 150 to 155 pound rate (on annual basis) during the first quarter of 1944. At present, available civilian supplies are perhaps 10 to 15 percent less than the rate of consumption in the first quarter of 1945.

1/ Nutritive analysis prepared by the Bureau of Human Nutrition and Home Economics.

For the year 1945, per capita civilian supplies are now indicated to be 120 to 125 pounds per capita, compared with the revised estimate of 150 pounds consumed in 1944 (the highest yearly rate since 1911), and the 1935-39 average of 126 pounds. The major reduction will be in pork, but civilian beef, and lamb and mutton supplies will be reduced also.

Largely reflecting a sharp drop in hog slaughter, meat production in 1945 is now indicated at about 22.5 billion pounds (wholesale dressed-weight basis), around 9 percent less than the record production of 24.6 billion pounds in 1944. Output, however, would still be about 39 percent larger than the 16.2 billion-pound average in 1935-39.

Output of beef and veal is expected to set a new record this year, totaling about 5 percent more than the previous high in 1944. On the other hand, production of lamb and mutton may be around 9 percent less. Total pork output in 1945 is now indicated at about 10.3 billion pounds, 20 percent smaller than in 1944 and 23 percent smaller than in 1943.

Total hog slaughter during the first 3 months of 1945 apparently was about 30 percent less than the record slaughter in the corresponding period of 1944. Supplies of hogs for slaughter during the remainder of the hog-marketing year (through September) probably will continue about 30 percent below those of the corresponding period a year earlier. Slaughter supplies of hogs during the last quarter of 1945 will be largely dependent on the size of the 1945 spring pig crop. If farmers carry out their intentions for spring farrowings (reported about December 1, 1944), this year's spring pig crop would be smaller than a year earlier, and slaughter in the last quarter of the year, although seasonally increased, would be moderately smaller than in the last quarter of 1944. Cattle and calf slaughter through the spring and summer probably will continue relatively large. Sheep and lamb slaughter was a record high for the season during the first 4 months of 1945, but slaughter during the last 7 or 8 months of the year probably will be smaller than in 1944. The early spring lamb crop, largely marketed in April-June, is estimated to be 6 percent less than a year earlier. The late crop probably will be smaller also.

Table 4 - Estimated meat production, average 1935-39, annual 1941-44 and forecast 1945 (dressed-weight basis)

| Item | Average 1935-39 | 1941 | 1942 | 1943 revised | 1944 prelim-inary | 1945 forecast |
|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| Beef | 1/ 6,936 | 8,092 | 8,831 | 8,523 | 9,137 | 9,590 |
| Veal | 1/ 1,038 | 1,029 | 1,139 | 1,160 | 1,595 | 1,640 |
| Pork, excluding lard | 7,337 | 9,447 | 10,723 | 13,349 | 12,893 | 10,300 |
| Lamb and mutton | 871 | 925 | 1,045 | 1,104 | 1,023 | 930 |
| Total | 16,182 | 19,493 | 21,738 | 24,136 | 24,648 | 22,460 |

1/ Includes 57 million pounds of beef and 5 million pounds of veal produced under the emergency Government relief purchase program in 1935.

To improve the distribution of this smaller supply in the face of continued strong civilian demand and continued large Government procurement, an integrated Government program has recently been announced. An intensified campaign will be waged against the black market in meat. New controls are being placed on slaughter in non-federally inspected plants so that slaughter in federally inspected plants may be increased, in order to facilitate government meat procurement and to increase civilian supplies in deficit meat producing States. Federally inspected meats are the only kind that can legally move across state lines to supply people in areas removed from producing centers. Office of Price Administration is assigning slaughter quotas for non-federally inspected commercial slaughterers and persons who have livestock custom slaughtered in 1945, based upon their slaughter and number of ration points surrendered to O.P.A. in corresponding periods of 1944. Farm sales of meat will be controlled so that farmers in general may not sell more meat in any quarter in 1945 than they sold in a corresponding quarter in 1944. A farmer who sold no meat in 1944 may not sell more than 400 pounds of meat in 1945.

Under the new program, subsidy payments to non-Federally inspected slaughterers will be limited. For hogs, payments will be made on a liveweight of slaughter equivalent to only 50 percent of the liveweight slaughtered in corresponding periods of 1944. For cattle and calves the limitation is 75 percent, and for sheep and lambs 100 percent.

Within the past month, several government actions have been taken to increase returns to meat packers. Increased rates of subsidy payments will be made to cattle slaughterers. The question of an increase in pork price ceilings or an increase in subsidies to hog slaughterers is under study. In the meantime, a 40 cent increase in subsidy payments per 100 pounds liveweight, has been granted, subject to later revision. Ceiling prices for sales of both pork and beef products to the Government have been increased. A special subsidy provision has been made so that individual slaughterers who operated profitably before the war will not be forced to discontinue operation in 1945 because of low returns.

Because of the sharp reduction in meat output and large disappearance in the past few months, there has been no net into-storage movement as is usual during the winter and early spring. Total holdings of meat and edible offals in commercial cold storage warehouses and meat-packing plants on April 1 were reported to be 564 million pounds, over 687 million pounds less than a year earlier. The quantity in cold storage April 1, 1945, was the lowest for the month on record, whereas a year earlier cold storage stocks were the highest for the month in over 20 years and were near the all-time high for any month.

In 1944, non-civilian takings out of current meat supplies (i.e. military, exports, and net WFA purchases) totaled about 5.6 billion pounds, dressed weight. About 70 percent of this went to the United States armed forces. Requirements for meat for troops are larger this year, and the requirements for feeding prisoners of war and liberated people in Europe have also increased. Some of the requirements for liberated areas are being met by shipments from other countries, particularly Canada and Argentina.

Pertinent data on the per capita civilian supplies of meat, poultry, and fish in the United States, Canada, and European countries in pre-war years and the latest available war years are given in the table on page 13. Estimates for the United States, Canada, and the United Kingdom are more nearly comparable than those for the other countries. There is a wide range in the reliability of both the pre-war and the 1943-44 data for Continental European countries. These data are presented solely to provide a rough indication of the extent to which meat consumption has been changed in the various countries during the war. Data for the European countries are available only on a crop-year basis approximately August-July, in the United States, United Kingdom and Canada on a calendar-year basis. Therefore average consumption for the calendar years 1943 and 1944 are presented here for the United States, Canada and the United Kingdom, to be more nearly comparable with the data for Continental Europe for the 1943-44 crop year. Continental European per capita civilian consumption of all foods in the 1944-45 crop year is believed to be generally somewhat below that of 1943-44, except for Soviet Russia where the very tight food situation of 1943-44 apparently has improved slightly as the result of the occupation of important agricultural areas. European food production in 1945-46 is expected to drop somewhat further from the 1944-45 level and to be the smallest since the outbreak of the war. 1/

There is considerable variation in the percentage change in food supplies of the individual countries since 1943-44. Because of wartime disorganization, the rates of consumption of various population groups within each country also differ greatly. Farm consumption may average 25 to 30 percent higher than non-farm. Governmental disorganization has disrupted supply and distribution controls and economic uncertainty has impeded production in normally surplus producing areas. The destruction of bridges, highways, railroads and equipment has caused the breakdown of transportation throughout the liberated areas. In some areas, actual destruction of supplies of foods has been severe, particularly by flooding in the Netherlands, and by enemy action in some combat areas.

Poultry and Eggs

Civilian egg consumption during the first quarter of 1945 was about 100 eggs per capita, a record for that period. Consumption is still continuing at a record rate since supplies of other high protein foods are short of consumer demand. Egg production during the first quarter of 1945 was 7 percent less than in 1944, and is expected to continue moderately below last year. However, the heavy civilian demand for eggs has been accompanied by a 40 percent reduction, compared with last year in the quantity of eggs used in dehydrating. For the entire year, 950 million dozen eggs were dried, about 60 percent of them in the first 6 months. Military requirements for both shell and dried eggs are above those of last year, and so far this year the military has been encountering difficulties in obtaining needed supplies. Priorities were instituted in April by the armed forces to obtain shell and frozen eggs for storage and current needs.

1/ The Food Situation and Outlook in Continental Europe, the Mediterranean Area, and the Soviet Union, Office of Foreign Agricultural Relations, U. S. Department of Agriculture, May 1, 1945.

Table 5.- Meat, Poultry and Fish 1/

Estimated pre-war and wartime civilian per capita supplies, United States, Canada and several European countries
(Pounds - dressed weight)

| Country | Pre-war 2/ | 1943-1944 3/ | 1943-1944 as a percentage of pre-war | Preliminary indication 1945 4/ | 1945 as a percentage of pre-war |
|---|---|---|---|---|---|
| | Pounds | Pounds | Percent | Pounds | Percent |
| United States | 168 | 194 | 115 | 166-171 | 99-102 |
| Canada | 153 | 194 | 127 | | |
| United Kingdom | 166 | 136 | 82 | | |
| Denmark | 183 | 148 | 81 | | |
| Belgium | 129 | 56 | 43 | | |
| France | 115 | 75 | 65 | | |
| Netherlands | 115 | 51 | 44 | | |
| Norway | 169 | 115 | 68 | | |
| Finland | 100 | 50 | 50 | | |
| Germany | 130 | 90 | 69 | | |
| Austria | 128 | 73 | 57 | | |
| Poland | 48 | 33 | 69 | | |

Sources: United States - Bureau of Agricultural Economics; Canada and United Kingdom - Combined Food Board; preliminary estimates for other countries - Office of Foreign Agricultural Relations.

1/ Meat, including offals, poultry, game, and fish. Fish for Norway and Denmark landed weight.

2/ For the United States and Canada, the pre-war average is for the years 1935-39; United Kingdom and Belgium - 1934-38; other countries - 1933-37.

3/ Average of calendar year data for 1943 and 1944, for the United States, Canada, and the United Kingdom. For the other countries, data are on a crop year basis, approximately August - July.

4/ Estimates for 1945 are available only for the United States.

In the last 6 months of 1945 civilian egg supplies will be reduced because of the seasonal decrease in production. Civilian demand at ceiling prices probably will exceed the supply during the latter part of the year. For the year as a whole, civilian per capita consumption may average an egg a day, 366 eggs for the year compared with 351 eggs in 1944 and the 298 egg average in 1935-39.

Table 6.- Cold storage holdings of eggs, U. S., April 1, 1935-39 average, 1944, and 1945

| | April 1, average 1935-39 | April 1, 1944 total holdings | April 1, 1945 | |
|---|---|---|---|---|
| | | | Total holdings | Non-Gov't owned holdings |
| | Mil. doz. | Mil. doz. | Mil. doz. | Mil. doz. |
| Shell | 37 | 134 | 53 | 32 |
| Frozen | 47 | 119 | 92 | 72 |
| Dried | --- | 202 | 300 | 37 |

Civilian supplies of poultry meat have been short of consumer demand at ceiling prices by a wide margin for several months. Although marketings of chickens are increasing seasonally, total supplies will probably remain below last year. Production of chicken meat in 1944 was 3,460 million pounds, dressed weight, of which 610 million pounds were from commercial broilers. For 1945, chicken meat production will probably be less than in 1944. Output of commercial broilers is expected to increase 10 to 15 percent, but the decrease in the quantity of chicken meat from general farm flocks will probably more than offset this increase. Commercial exports and shipments of chickens in 1944 were large when compared with previous years, but they made up only a small part of the total non-civilian takings of about 478 million pounds. Requirements for the armed forces for 1945 are significantly higher than last year, so that supplies available for civilians will be smaller. Civilian per capita chicken consumption in 1945 is estimated at about 20 pounds compared with 23.6 pounds in 1944. The 1944 consumption rate was nearly 5 pounds below the record level in 1943, but was about 5 pounds above the 1935-39 average of 18 pounds.

Production of turkey meat during 1944 was at a record of 547 million pounds dressed weight, 17 percent above 1943. Turkey meat production this year is expected to be between 575 and 600 million pounds. Despite somewhat larger requirements by the armed forces, civilians are expected to get larger supplies than in 1944, perhaps one-quarter of a pound more per capita. During 1944 per capita consumption was about 3.3 pounds, compared with 2.6 pound average for the 1935-39 period and the 3.7 pound record in 1942.

Dairy Products

The outlook for civilian supplies of dairy products is for continued ample supplies of fluid milk and short supplies of manufactured products except those using skim milk.

Civilians have been consuming well over half of their total milk supply in the form of fluid milk and cream-- about 423 pounds per capita in 1944--and they may take almost 430 pounds (whole milk equivalent) or 200 quarts, per capita this year. This record consumption rate would be 26 percent above the 1935-39 average. Fluid milk is both a very popular drink and a highly important food because of its nutrients. About half of the calcium of the average civilian diet in 1945, 15 percent of the protein and 30 percent of the riboflavin, will come from fluid milk and cream. The plentiful supplies of fluid milk are principally the result of the record total milk production in prospect this year. Production during the first quarter was at an annual rate of over 121 billion pounds. Fluid cream consumption in 1943 and 1944 was significantly below the pre-war level, but a somewhat larger quantity than in 1943 and 1944 is now available. Milk sold for fresh consumption has generally yielded greater returns to producers than that sold to processors, so the demand for fluid milk has usually been filled first. The demand for fluid milk and cream increases noticeably as incomes go up and has been particularly strong in the past 2 or 3 years.

Butter supplies in 1945 are expected to average about 10 pounds per capita, 1 to 2 pounds less than the rate of consumption in the past 2 years. Production this year is forecast at 1,740 million pounds compared with 1,816 million in 1944 and the 2,170 million pound average in 1935-39. Non-civilian requirements, chiefly United States military, are indicated to be half again as large as the 280 million pounds taken from 1944 production. War Food Administration stocks accumulated in 1943 were used to fill about a third of last year's non-civilian requirements.

Civilians may get about as much cheese in 1945 as they have in the past 2 years when consumption averaged 5 pounds per capita. Military requirements are higher, but American cheese production is being increased. Total cheese production may be 1,085 million pounds in 1945, almost 75 million more than 1944 and only 25 million below the record production of 1942.

Latest indications are that evaporated and condensed milk supplies for civilians will be somewhat reduced this year, perhaps 5 percent. Consumption per capita in 1944 averaged about 16.2 pounds, about one half pound less than in the 1935-39 period. The decreased civilian supplies for 1945 are the direct result of considerably increased non-civilian needs, both for the United States armed forces and for relief use in Europe. War Food Administration stocks are quite small in comparison with the shipments to be made this year.

Civilians will probably consume a record quantity of nonfat solids in the form of cottage cheese, buttermilk and other skimmed milk products. There will be a strong demand for these items in view of scarcity of other foods, especially meat and fuller utilization of the milk supplies is expected in 1945 than in any previous year.

Table 7.- Production of milk and principal manufactured dairy products, average 1935-39, 1941-44 and forecast for 1945

| Item | 1935-39 | 1941 | 1942 | 1943 | 1944 | 1945 1/ |
|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| Milk on farms | 103,624 | 115,498 | 119,240 | 118,140 | 118,952 | 120,000 |
| Creamery butter | 1,691 | 1,872 | 1,764 | 1,674 | 1,487 | 1,425 |
| American cheese | 509 | 753 | 917 | 765 | 800 | 875 |
| Other cheese 2/ | 160 | 202 | 195 | 228 | 209 | 210 |
| Evaporated and condensed milk | 2,225 | 3,555 | 3,782 | 3,343 | 3,758 | 3,910 |
| Dried whole milk | 19 | 46 | 62 | 138 | 172 | 220 |

1/ Forecast.
2/ Does not include Cottage, Pot, or Baker's.

The table on page 17 contains the best available data on the pre-war and war time consumption of milk and some dairy products in the various European countries. Cheese and skim milk are excluded only because information on their pre-war consumption is not available for some of the countries. The data are in terms of milk equivalent on fat solids basis.

Fats and Oils

The shortage of fats and oils is not likely to be materially eased before late spring or summer of 1946. Present indications are that per capita civilian supplies of all edible fats and oils in 1945 will be between 38 and 40 pounds (fat content except for butter which is on an actual weight basis). This would be 10 to 15 percent below the consumption of 44.7 pounds in 1944 and 17 to 21 percent below the pre-war rate of 48 pounds per capita. The principal reductions from last year's level will be in butter and lard, but there will also be some reduction in shortening and cooking and salad oils.

Smaller butter supplies for civilians are a result of lower output than last year and expanded Government procurement. In 1944, a substantial part of military and lend-lease requirements was met from Government stocks accumulated in 1943. Stocks on January 1, 1945, were small.

The decline in lard supplies for civilians reflects a sharp reduction in output and large requirements for military, lend-lease and European relief. Lard output this spring is approximately 40 percent below the exceptionally high level last spring. In addition, commercial lard stocks are low, estimated at about 35 million pounds on March 31. WFA stocks on March 31 were about 70 percent less than the peak of around 500 million pounds reached last summer.

Table 8.- Milk, Whole and Standard 1/
Estimated prewar and wartime civilian per capita supplies,
United States, Canada, and several European Countries,
(Pounds-retail weight equivalent)

| Country | Prewar 2/ | 1943-44 3/ | 1943-44 as a percentage of prewar | Preliminary indication for 1945 4/ | 1945 as a percentage of prewar |
|---|---|---|---|---|---|
| | Pounds | Pounds | Percent | Pounds | Percent |
| United States | 393 | 473 | 120 | 484 | 123 |
| Canada | 456 | 533 | 117 | | |
| United Kingdom | 249 | 311 | 125 | | |
| Denmark | 386 | 356 | 92 | | |
| Belgium | 180 | 126 | 70 | | |
| France | 190 | 130 | 68 | | |
| Netherlands | 287 | 167 | 58 | | |
| Norway | 390 | 304 | 78 | | |
| Finland | 610 | 411 | 67 | | |
| Germany | 270 | 160 | 59 | | |
| Austria | 450 | 250 | 56 | | |
| Poland | 230 | 170 | 74 | | |

Sources: United States - Bureau of Agricultural Economics; Canada and United Kingdom - Combined Food Board; preliminary estimates for other countries - Office of Foreign Agricultural Relations.

1/ Dairy products except butter, cheese, and skim milk products in terms of milk equivalent, fat solids basis. Part of milk consumed in European countries is skimmed to about 2.5 percent fat content, called "standard". The general European food situation is discussed on page 12.

2/ For the United States and Canada, the prewar average is for the years 1935-39; United Kingdom and Belgium -- 1934-38; other countries -- 1933-37.

3/ Average of calendar year data for 1943 and 1944, for the United States, Canada, and the United Kingdom. For the other countries, data are on a crop year basis, approximately August-July.

4/ Estimates for 1945 are available only for the United States.

Reduction in civilian supplies of shortening and oils reflects increased military procurement and shipments abroad. In 1944, a substantial part of Russian lend-lease commitments for fats and oils was met by shipping linseed oil. This year, the supply of linseed oil is short and only small quantities have been shipped.

Total putput of fats and oils, edible and inedible, from domestic materials in 1945 is indicated to be about 1.2 billion pounds less than the 10.8 billion pounds produced in 1943 and again in 1944. Production of primary fats and oils used principally for food purposes probably will be around 7.1 billion pounds, down 10 percent from the 7.9 billion pounds produced last year. Output of fats and oils used mainly in soap, paint, and other inedible products, indicated at 2.5 billion pounds in 1945, would be about 13 percent less than last year. Imports of fats and oils in 1945 are not expected to be materially greater than in 1944. Stocks at the beginning of 1945 were slightly less than a year earlier. The total supply of fats and oils in 1945 is substantially less than in 1944. Military requirements and export commitments for fats and oils in 1945, on the other hand, continue large.

Table 9

Estimated production of primary fats and oils from domestic materials, average 1935-39, 1941-44 and forecast 1945
(Vegetable oils, crude basis)

| Item | Average 1935-39 | 1941 | 1942 | 1943 | 1944 preliminary | 1945 forecast |
|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. |
| Butter, creamery and farm | 2,170 | 2,267 | 2,130 | 2,015 | 1,816 | 1,740 |
| Lard and rendered pork fat | 1,630 | 2,281 | 2,469 | 3,056 | 3,215 | 2,300 |
| Edible tallow 1/ | 219 | 234 | 277 | 259 | 198 | 195 |
| Corn oil | 128 | 203 | 248 | 239 | 211 | 225 |
| Cottonseed oil | 1,425 | 1,392 | 1,386 | 1,313 | 1,133 | 1,325 |
| Olive oil | 4 | 10 | 7 | 10 | 6 | 5 |
| Peanut oil | 63 | 150 | 77 | 152 | 111 | 90 |
| Soybean oil | 261 | 586 | 762 | 1,234 | 1,236 | 1,250 |
| Total, primarily edible | 5,900 | 7,123 | 7,356 | 8,278 | 7,926 | 7,130 |
| Inedible tallow and grease6 | 879 | 1,551 | 1,742 | 1,650 | 1,943 | 1,800 |
| Marine animal oils | 270 | 221 | 158 | 175 | 215 | 190 |
| Linseed oil 2/ | 178 | 466 | 700 | 715 | 729 | 500 |
| Tung oil | 1 | 4 | 2 | 5 | 2 | 9 |
| Neat's-foot oil and wool grease | 13 | 18 | 20 | 18 | 19 | 21 |
| Total, primarily inedible | 1,341 | 2,260 | 2,622 | 2,563 | 2,908 | 2,520 |
| Grand total | 7,241 | 9,383 | 9,978 | 10,841 | 10,834 | 9,650 |

Compiled from reports of Bureau of the Census, U. S. Department of Agriculture and Fish and Wildlife Service.

1/ Includes oleostearine, oleo oil, and oleo stock.

2/ Calculated as total production minus oil equivalent of net imports of flaxseed.

The non-U.S.-civilian takings of both edible and inedible fats and oils, i.e. military, commercial exports, and net WFA purchases, totaled about 2.7 billion pounds in 1944. The United States armed forces took nearly 40 percent of this total; the major part of the remainder was shipped under lend-lease. This year, military procurement is larger, and the combined requirements for lend-lease countries and liberated areas are about as large as last year. Some of the European requirements will be met by shipments from other American countries and from war reserve stocks in the United Kingdom. European countries, excluding the United Kingdom and Russia, imported about 30 percent of their supplies of fats and oils before the war. Such imports were largely cut off during the German occupation. The table on page 20 contains background information for appraising the requirements for European countries.

Fruit

Prospects continue generally favorable that civilian supplies of fresh fruits late this spring will be about as large as a year earlier, in spite of some damage to the new crop of deciduous fruits in midwestern and eastern areas by the freezes in the early spring. Supplies of fresh strawberries, the earliest of important small fruits this year, reached a peak in late April, but marketings will continue into June. Shipments so far this season have been about twice as large as last year. Supplies of fresh cherries and peaches are now coming on the market, to be followed shortly by fresh plums, apricots, and other deciduous fruits from the 1945 crops.

Citrus fruits will provide the major part of the fresh fruit supply until late June or early July, when deciduous fruits become more important in the supply picture. Supplies of oranges and lemons are expected to continue generally plentiful all spring, but supplies of grapefruit and storage apples will continue to decline seasonally. Present indications are that civilian per capita consumption of fresh citrus fruits this year is as large as last year's record of 68 pounds.

Apples have been plentiful this winter and spring because of last fall's excellent crop. Per capita consumption of apples for the year 1945 will equal the pre-war average of 30 pounds, providing this year's commercial crop is not more than 10 percent below last year's.

The outlook for other fruits in the aggregate this year is for smaller production than the 1944 bumper yield. This might mean 6 or 7 pounds less per capita. No particular increase in the importation of bananas and other fruits is expected, unless the Caribbean shipping situation should improve.

Supplies of frozen fruits and berries are considerably larger this spring than last. Current supplies of canned fruits continue short, but those of canned citrus juices are about as large as a year ago. Preliminary indications are that the 1945 pack of canned fruits may be about the same as in 1944. Military requirements in 1945 may not differ much from last year. However, civilian canned fruit consumption from the 1945 pack, on a per capita basis, may not be quite as large as the 1944-45 pack year average of 10 pounds, since stocks of canned fruits are not available to supplement supplies from the new pack. Canned fruit juice supplies for United States civilians in 1945 may be larger than the 1944 record of 10 pounds per capita. The pack is much larger, but military requirements are greater also.

Table 10.- Fats and Oils (Including Butter) 1/

Estimated pre-war and wartime civilian per capita supplies, United States, Canada, and several European countries (Pounds - fat content basis)

| Country | Pre-war 2/ | 1943-1944 3/ | 1943-1944 as a percentage of pre-war | Preliminary indication 1945 4/ | 1945 as a percentage of pre-war |
|---|---|---|---|---|---|
| | Pounds | Pounds | Percent | Pounds | Percent |
| United States | 45 | 43 | 96 | 36-38 | 81-85 |
| Canada | 41 | 42 | 102 | | |
| United Kingdom | 46 | 39 | 85 | | |
| Denmark | 54 | 37 | 69 | | |
| Belgium | 40 | 19 | 48 | | |
| France | 35 | 11 | 31 | | |
| Netherlands | 48 | 21 | 44 | | |
| Norway | 49 | 24 | 49 | | |
| Finland | 30 | 15 | 50 | | |
| Germany | 52 | 29 | 56 | | |
| Austria | 31 | 25 | 81 | | |
| Poland | 17 | 11 | 65 | | |

Sources: United States - Bureau of Agricultural Economics; Canada and United Kingdom - Combined Food Board; preliminary estimates for other countries - Office of Foreign Agricultural Relations.

1/ Butter, margarine, lard, shortening, and other edible fats and oils. The general European food situation is discussed on page 12.
2/ For the United States and Canada the pre-war average is for the years 1935-39; United Kingdom and Belgium, 1934-38; other countries, 1933-37.
3/ Average of calendar year data for 1943 and 1944 for the United States, Canada, and the United Kingdom. For the other countries, data are on a crop-year basis, approximately August-July.
4/ Estimates for 1945 are available only for the United States.

The 1945-46 pack of dried fruits may be about 10 percent smaller than the 1,162 million pounds in 1944-45. Military requirements for the coming year are considerably larger, so civilian supplies will be reduced to about 4 pounds per capita, compared with about 6 pounds in 1943-44 and 1944-45, and 4 pounds in 1941-42. Dried fruits are considered highly desirable for relief purposes as well as for troops, because of the economy of shipping, nutritive value, general acceptability, and convenience.

Vegetables

Supplies of most fresh market truck crops are expected to be larger this spring than last , but supplies of asparagus, cauliflower, green onions and spinach will be smaller. Unusually warm weather advanced the date of earliest shipments in the Atlantic Coast States from Georgia to New Jersey, and in Texas. On the other hand, rain and cool weather delayed shipments in Lousiana, Arkansas, Alabama, Tennessee and California. Prolonged dry weather and above normal temperatures in Southern Florida in the past 3 months seriously curtailed production of snap beans, cucumbers, potatoes and tomatoes in that area.

Growers' intentions for summer season truck crops indicate smaller acreages than last year for cabbage and onions, but larger acreages for garlic and watermelons. It now appears that civilians may consume about 250 pounds of fresh vegetables in 1945, about the same as the record consumption of 1944.

More acres will be planted to truck crops for processing this year than last if processors' intentions are carried out. Prospective 1945 acreage of 9 principal vegetables totals 2 million acres. This is nearly 6 percent more than was planted in 1944, and about 36 percent more than the 10-year average (1934-43). The spinach adreage is about the same as last year. Fewer acres are expected to be planted in snap beans and cabbage for kraut than last year. On the other hand, a 12 percent increase over the 1944 planted acreages is intended for green peas and 4 percent each for corn, tomatoes and beets. The intentions to plant indicate that the acreage goals for truck crops for processing may be reached.

Civilian consumption of canned vegetables, excluding canned soups and baby foods1/, in 1945-46 may be only 28 to 30 pounds per capita because of increased military requirements. This rate of consumption would be 3 to 6 pounds below the average rate of 33 to 34 pounds in 1943-44 and 1944-45. During the past 2 pack years, packers' and distributors' stocks have been so reduced by heavy consumer demand that they are now considered to be at a working minimum. Military requirements are expected to take about 40 percent of the 1945 pack. Other non-civilian requirements are comparatively small, since canned vegetables are not being used much for relief feeding for cost and transportation reasons. Accordingly, the quantity of commercial canned vegetables which civilians will get is again dependent on military takings.

1/ See Table 13.

If potato yields equal the average of recent years, total production of potatoes in the year beginning July 1, 1945 may be slightly larger than in 1944. On the other hand, the prospective 1945 acreage of sweetpotatoes with average yields, would result in a crop of sweetpotatoes considerably smaller than in 1944. Average per capita consumption of potatoes during 1944-45, is about 119 pounds, and sweetpotatoes about 21 pounds. Preliminary indications of available supplies for 1945-46 are 116 pounds of potatoes and 17 pounds of sweetpotatoes. Noncivilian takings of both potatoes and sweetpotatoes apparently will be greater in 1945-46 than in the current crop year.

Civilian consumption of dry edible beans from the 1944-45 crop will be about 8.7 pounds per capita, equal to that of the previous year. Beans appear to have been relatively plentiful in most areas of the country, in comparison with consumer demand. March 1 stocks, in commercial storage, mostly in producing areas, amounted to 348 million pounds, cleaned basis, compared with 583 million pounds a year earlier and average March 1 stocks for the years 1942-43 of 593 million pounds. Farm stocks on March 1 this year were reported to be 82 million pounds, uncleaned basis, compared with 122 million pounds a year earlier. In addition, the WFA held another 250 million pounds in leased warehouses. Most of these will be shipped before next fall. Approximately 20 percent of the total disappearance of dry edible beans in 1944-45 will be for noncivilian use.

The 1945-46 crop on the basis of March 1 intentiona and with average yields may amount to 1,500 million pounds, cleaned basis, about the same as last year. The supply of beans for civilians during the coming crop year may be at the rate of 7 or 8 pounds per capita. However, dry edible beans are very desirable for relief feeding so non-civilian takings may increase over present expectations. During the calendar year 1944, about a third of the military supplies of beans were used for civilian feeding in Europe.

Military use of dry field peas for relief was almost 50 percent larger than its use of dry beans for relief. Large supplies of dry peas are still available, but they are still in the producing areas -- most of them in the Pacific Northwest. A major problem in securing the beans and peas for liberated areas of Europe is transportation across the United States and the Atlantic. Stocks of edible smooth dry peas in commercial storage places on March 1 totaled over 300 million pounds, cleaned basis, somewhat less than a year earlier but more than the average for 1942 and 1943. About 30 million pounds (uncleaned basis) remained on farms. WFA held about 675 million pounds in leased warehouses.

The 1945-46 crop of dry peas on the basis of intentions and with average yields, might reach 490 million pounds, (uncleaned basis), about 1.6 times the pre-war production level. In view of the large carry-over and little increase in civilian demand over the pre-war rate of half a pound per capita, large quantities of dry peas will be available to meet the increased requirements for liberated areas.

Sugar

Sugar supplies available to civilians in the United States will be much smaller during the remainder of 1945 than during the first quarter of this year or in 1944. Per capita civilian consumption, which averaged 89 pounds in 1944, is expected to be reduced to an annual rate of about 71 pounds for the last 9 months of 1945. This is a reduction of 20 percent.

The most important factors accounting for the reduction are (1) the smaller crop produced in Cuba this year (2) increased needs of the military forces and of liberated areas in Europe (3) the low level to which sugar stocks in the United States were reduced in 1944. Stocks were drawn on for 540,000 tons in 1944. This year's Cuban sugar crop is currently estimated at between 4 and 4.3 million tons. This is about one-half million tons less than was produced in the form of sugar last year. While the United States has purchased the entire Cuban crop of sugar, except for quantities needed for local consumption in the island and exports to Latin America, this does not mean that the people of the United States will be able to consume all of the Cuban sugar purchased. In pre-years, the United Kingdom and Canada also received much of their sugar supply from Cuba. This year, under previous agreement, substantial quantities will be shipped to Canada and the United Kingdom.

While the quantity of beet sugar produced in the United States in 1945 is likely to be somewhat larger than that produced in 1944, this increase will not be nearly sufficient to make up the decrease in supplies obtainable from Cuba. Also, none of this beet sugar will be available until late in 1945, and most of it normally would not be consumed until 1946. It is probable that no sugar will be available for export from the Philippines until 1947, because of war destruction.

Western Europe normally produces a major part of the sugar which its people consume. However, production has been greatly reduced by active fighting, disrupted transportation, lack of coal for operating sugar mills, and dislocated population. Some of Europe's pre-war supply of sugar was obtained from Java. Imports from Java have been cut off by Japanese occupation. Hence, with present unfavorable production prospects in Europe, substantial shipments of Cuban sugar will have to be made if Europe is to obtain the minimum quantities needed.

Table 11 contains the available information for the United States, Canada, and several European countries on pre-war and war-time consumption of sugar in terms of sugar content of the average diet per person per year. The reliability of the data and the general European food situation are discussed on page 12.

According to WFA allocations, military needs for sugar in 1945 amount to 1,262,000 tons, about 9 percent more than in 1944. This increase is needed because of the larger number of men in the services stationed abroad, and the larger number of war prisoners and others who must be fed by Army and Navy. It is expected that the military will use about one-fifth of the total supply of sugar available to the United States in 1945.

Total stocks of sugar in the United States on January 1, 1945, amounted to 1,226,474 tons, raw value, as compared with 1,766,336 tons a year earlier and 2,137,416 tons on January 1, 1943. Stocks on hand at the beginning of this year were the lowest since comparable records became available, and are close to the minimum necessary at that time of year if continuous distribution throughout the country is to be maintained.

Table 11 - Sugar 1/

Estimated pre-war and war-time civilian per capita supplies, United States, Canada, and several European countries (Pounds - refined, sugar content basis)

| Country | Pre-war 2/ | 1943-1944 3/ | 1943-44 as a percent of pre-war | Preliminary indications 1945 4/ | 1945 as a percent of pre-war |
|---|---|---|---|---|---|
| | Pounds | Pounds | Percent | Pounds | Percent |
| United States | 107 | 98 | 92 | 86 | 80 |
| Canada | 104 | 92 | 88 | | |
| United Kingdom | 110 | 74 | 67 | | |
| Denmark | 110 | 71 | 65 | | |
| Belgium | 63 | 49 | 78 | | |
| France | 50 | 27 | 54 | | |
| Netherlands | 75 | 42 | 56 | | |
| Norway | 73 | 38 | 52 | | |
| Finland | 63 | 19 | 30 | | |
| Germany | 48 | 44 | 92 | | |
| Austria | 50 | 45 | 90 | | |
| Poland | 19 | 19 | 100 | | |

Sources: United States - War Food Administration; Canada and United Kingdom - Combined Food Board; preliminary estimates for other countries - Office of Foreign Agricultural Relations.

1/ Total for human consumption; excludes sugar and sirup used for industrial purposes but includes sugar in canned fruits and vegetables, condensed milk, and cereal breakfast foods as well as sugar and sirup used in brewing and distilling. The general European food situation is discussed on page 12.

2/ For the United States and Canada, the pre-war average is for the years 1935-39; United Kingdom and Belgium - 1934-38; other countries - 1933-37.

3/ Average of calendar year data for 1943 and 1944 for the United States, Canada, and the United Kingdom. For the other countries, data are on a crop year basis, approximately August-July.

4/ Estimates for 1945 are available only for the United States.

Food Grains

On the basis of present crop prospects another very large wheat crop is expected in 1945, again providing liberal supplies of wheat for all purposes. Winter wheat production of 863 million bushels was indicated on the basis of April 1 conditions. 1/ If the yields are about average (1937-42) on the 19 million acres which farmers intended on March 1 to plant in spring wheat, the spring crop would yield about a quarter million bushels. Accordingly, the total crop might exceed the record 1,079 million bushels produced in 1944. A crop in excess of a billion bushels would undoubtedly result in a larger carry-over on July 1, 1946, than the carry-over in prospect on July 1, 1945, even with large-scale exports and continued relatively large domestic disappearance.

The United States has enough wheat on hand now to supply as much as 250 million bushels for the feeding of the liberated people of Europe and our Allies from now until our new crop is harvested. This is much more than the total of such requirements from the United States supply which have been submitted to date. Furthermore, the actual shipments to Europe of both the grain and milled wheat will probably fall short of the total requirements this spring and summer because of the shortage of railroad cars for shipment to the ports. There is also a serious shortage of sacks for flour and for the grain. European port facilities have been damaged so much that little grain can be shipped in bulk. A billion bushel wheat crop this summer would guarantee abundant supplies for relief in 1945-46, to supplement the European harvest.

The rye crop was in better condition on April 1 this year than on April 1, 1944 1/ . However, the acreage of rye to be harvested may be smaller than was harvested last year. Therefore, 1945 rye production may not be greatly different from the production in 1944. Even with a July, 1945 carry-over of about 15 million bushels, only about half of the 1943-44 carry-over, total supplies would still be adequate to meet prospective domestic requirements. Per capita consumption in 1945 may be about 2.5 pounds of rye flour compared with about 2.8 pounds in 1944. The slight reduction in consumption reflects the shortage of man-power for rye bread baking.

Civilian per capita consumption of rice in 1944-45 is expected to average 5.7 pounds, which is about the same as in the past few years. Because of the rapid movement into civilian channels earlier in the marketing year, shortages may become apparent in some local markets this summer. If growers' intentions are carried out and if yields are about average, production in 1945 may be expected to reach about 71 million bushels. While a crop of this size would set a new record, the demands for military and civilian food in the Orient are so great that civilian consumption out of the 1945 crop may be considerably below average.

The supplies of corn, oats, and barbey on hand and in prospect for 1945 probably will be large enough to meet the indicated requirements for livestock feed, increased civilian demand for food and industrial products and all non-civilian requirements now forseen. Corn sugar and sirup consumption may be larger than in 1944 because of reduced supplies of other sugars. Oatmeal consumption is expected to be as large as in 1943 because of the short supplies of meats and some other foods. There may be little or no change in the consumption of barley food products.

1/ May 1 condition is not available at time this is prepared.

## THE 1945 FISH SUPPLY SITUATION 1/

The year 1945, more than any other year since the war, finds the United States fisheries occupying a key position in our domestic food front. Heavy war requirements for high-protein foods and reduced civilian supplies of meat and poultry, in addition to increased consumer demand, have contributed to the increased importance of the fishing industry in our national economy.

In an average pre-war year, the fishing industry of the United States and Alaska produced about 4.5 billion pounds of fish and shellfish. In 1944 the total was 4.4 billion pounds. In addition to the consumption of fish and fishery products as food, these products contribute directly to the war effort in many other ways. About one-third of the total pre-war production was utilized in the manufacture of meal and oil and other byproducts. Another one-third went to produce canned fish. The remainder found its outlet in the following final forms: 680 million pounds fresh, 340 million pounds packaged, 150 million pounds cured, and 130 million pounds frozen (excluding packaged). Over and above these national figures, our pre-war domestic supply was supplemented by net imports amounting to about 188 million pounds of edible fishery products.

Fish meal is one of the principal sources of protein used for poultry and livestock feed, and has contributed to the high war levels of farm production. Fish liver oil has become invaluable in both human and livestock nutrition. Other fish oils serve a long list of useful purposes in industry and art. Still other marine products include crushed shells for poultry feed and road construction, pearl essence, buttons, and ornamental objects and marine algae products.

Supplies of all fish for human consumption by United States civilians in 1945 may approximate those of 1944. It is estimated that in 1944, per capita consumption, in dressed weight equivalents, did not exceed 7.9 pounds, of which 5.2 pounds were fresh and frozen, 2.0 pounds were canned, and 0.7 pound was cured. Per capita consumption of all fish for the 5-year period 1935-39 averaged 12.9 pounds. During this period, the consumption of fresh and frozen fish accounted for about 6.4 pounds, canned fish 5.4 pounds, and cured fish about 1.1 pounds. The decrease in over-all per capita consumption by 5.0 pounds is, of course, due principally to heavy purchases of canned and cured fish for war purposes by the Government.

Needs for the military services, relief agencies, and other Government claimants have already made it necessary to reserve 80 percent of the packs of sardines (both Pacific and Atlantic), Atlantic sea herring, mackerel, salmon and the entire pack of canned flaked fish. Considering the packs of all canned fish, including those for which no set-aside orders are in effect, Government purchases will probably account for about 70 to 75 percent of all fish canned in 1945. Some of the more important canned items not affected by set-aside are tuna, clam products, shrimp, and oysters. Although there

---

1/ By Maurice Rattray, Chief, Harold Abel, Economist, Fish and Fish Products Division, SCB Office of Marketing Services, War Food Administration.

will be less canned fish available for civilians, owing to the increased requirements for the military, there are expected to be greater supplies of fresh and frozen fish, particularly fresh fish which would tend to offset this decrease.

Canned salmon - the largest item of canned fish produced in the Nation - was difficult to buy throughout the greater part of 1944 according to independent retail grocers reporting to the Bureau of Labor Statistics in 56 large cities. Shortages of salmon varied widely throughout the country on the date of each survey for the 11-month period during which data were collected. (See table 12)

The Pacific Coast area was better supplied than any other section of the country, with only one-third of the stores showing no stocks. On the other hand, in the South Atlantic region approximately 7 out of 10 stores were out of stock during the period under observation. Both the Great Lakes and Middle Atlantic areas averaged 58 percent, with South Central 60 percent, Middle West 56 percent, New England 50 percent, and Rocky Mountain 50 percent.

With the single exception of New England, the areas nearest primary distribution points were best supplied. Retail stores farthest removed from initial outlets found it difficult to replenish their stocks. Nearly 90 percent of the United States production of salmon comes from Alaska and is packed largely during July, August, and September. After canning operations have been completed, the entire pack is shipped to Seattle and other Pacific North West cities for general distribution. Since the institution of Government procurement programs, dealers have been required to withhold deliveries to domestic buyers until all Government requirements have been met. This has caused some delay in moving the new pack through civilian channels.

The first 3 months of the period studied were the most favorable for family food shoppers. The 3 months of the third period found the least amount of canned salmon on the grocers' shelves, as a result of the seasonally low production and heavy set-aside orders. The pattern of distribution of canned salmon by areas in 1945 is expected to be about the same as in 1944, with the exception of an over-all decrease in the percentage of stocks in all areas. In addition, it is expected that areas closer to points of distribution will tend to get a larger percentage of the total available for civilians. Monthly distribution patterns of stocks in each area also are expected to be much the same as in 1944.

Fresh and frozen fish are in a favorable position at this time to absorb the expansion of civilian demand for fish. This part of the industry is not subject to a set-aside order, and the war services take only a small proportion of its total production. Although accurate data are not available as to the substitution of fresh and frozen fish for meat, it is known that as a result of wartime shortages a high degree of substitution does take place.

Table 12.- Supplies of canned salmon in independent retail stores, by areas 1/. Percent of stores without stock in 56 large cities on date of survey March 1944 to January 1945

| Date of Survey | Regions 2/ | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | All (56 large cities) | I New Eng. | II Mid. Atl. | III Gr. Lakes | IV So. Atl. | V So. Centr. | VI Mid. West | VII Rocky Mt. | VIII Pacific |
| 1944: March 14 | 11 | 6 | 10 | 27 | 42 | 8 | 13 | 0 | 1 |
| April 18 | 14 | 7 | 14 | 16 | 25 | 17 | 10 | 0 | 4 |
| May 16 | 22 | 5 | 20 | 11 | 49 | 33 | 10 | 5 | 11 |
| June 13 | 46 | 25 | 47 | 56 | 68 | 37 | 41 | 10 | 28 |
| July 18 | 73 | 70 | 71 | 79 | 3/ | 82 | 73 | 44 | 44 |
| Aug. 15 | 80 | 89 | 82 | 83 | 3/ | 90 | 83 | 72 | 51 |
| Sept. 12 | 85 | 87 | 84 | 86 | 3/ | 3/ | 88 | 86 | 73 |
| Oct. 17 | 84 | 53 | 90 | 84 | 85 | 3/ | 89 | 3/ | 61 |
| Nov. 14 | 80 | 76 | 78 | 85 | 87 | 88 | 75 | 3/ | 61 |
| Dec. 12 | 71 | 70 | 81 | 54 | 83 | 65 | 72 | 79 | 42 |
| 1945: Jan. 16 | 58 | 61 | 61 | 59 | 74 | 50 | 61 | 62 | 30 |
| Avg. for Period: | | | | | | | | | |
| Mar. 14-May 16 | 16 | 6 | 15 | 18 | 39 | 19 | 11 | 2 | 5 |
| June 13-Aug. 15 | 66 | 61 | 67 | 73 | 86 | 70 | 66 | 42 | 41 |
| Sep. 12-Nov. 14 | 83 | 72 | 84 | 85 | 88 | 3/ | 84 | 3/ | 65 |
| Dec. 12-Jan. 16 | 65 | 65 | 71 | 57 | 79 | 58 | 67 | 71 | 36 |
| Avg. on date of survey for 11-mo. period | 57 | 50 | 58 | 58 | 72 | 60 | 56 | 50 | 36 |

1/ Chain stores not covered in this survey. Data from independent stores are weighted by the number of independent stores in each city to derive regional and all-city percentages. Zero reports indicate that some size, quality, or variety of the commodity was available in all stores surveyed.

2/ New England (Region I)--Boston, Bridgeport, Fall River, Manchester, New Haven, Portland, Me., Providence. Middle Atlantic (Region II)--New York, Baltimore, Buffalo, Newark, Philadelphia, Pittsburgh, Rochester, Scranton, Washington. Great Lakes (Region III)--Cleveland, Cincinnati, Columbus, Detroit, Indianapolis, Louisville. South Atlantic (Region IV)--Atlanta, Birmingham, Charleston, Jackson, Jacksonville, Knoxville, Memphis, Mobile, Norfolk, Richmond, Savannah, Winston-Salem. South Central (Region V)--Dallas, Houston, Kansas City, Little Rock, New Orleans, St. Louis, Wichita. Middle West (Region VI)--Chicago, Cedar Rapids, Milwaukee, Minneapolis, Omaha, Peoria, St. Paul, Springfield. Rocky Mountain (Region VII)--Denver, Butte, Salt Lake City. Pacific (Region VIII)--San Francisco, Los Angeles, Portland, Ore., Seattle.

3/ Over 90%.

Source: U. S. Department of Labor, Bureau of Labor Statistics.

Wholesale and retail prices of regulated species of all fish are expected to remain at or near ceilings throughout most of 1945, reflecting strong civilian demand and increased requirements of noncivilian claimants.

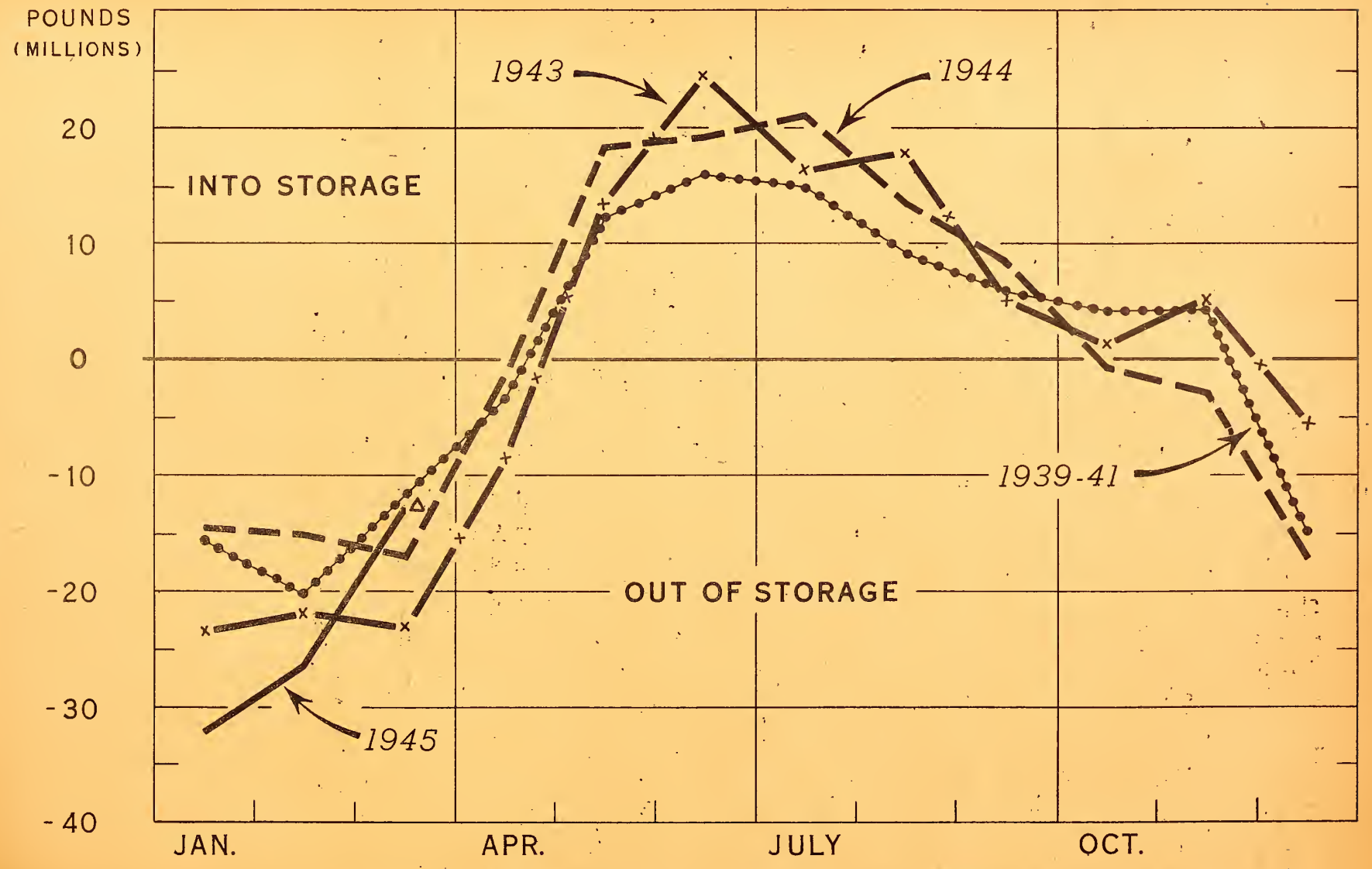
As the fresh and frozen fish industry entered the new production season, the carry-over stocks of frozen fish on April 1 were 13,500,000 pounds lower than they were a year ago. Freezings of fish for the first quarter of 1945 were much below last year, and considerably below that expected at this season of the year. On the other hand, New England fisheries, which contribute a large proportion of the total national production of fresh and frozen fish, registered a 21 percent increase for the first quarter of 1945 over the same period a year ago. Most of the production was channeled through the fresh market.

On October 1, 1944, cold storage holdings of fish and shellfish were the highest in the history of the industry -- 132,000,000 pounds. Heavy net movements from storage occurred during October, November, and December 1944 and continued through January and February of this year (See chart). This large out-of-storage movement reflects a strong consumer demand and seasonally small supplies of fresh fish.

While no current data are available, it is known that fish consumption varies widely by regions in the United States. It is believed to amount to more than 30 pounds per capita in the larger coastal cities, while in many sections of the interior, very little fish is eaten. In normal times consumption of canned and cured fish, by the very nature of the product, is distributed more widely than either fresh or frozen fish. The general distribution pattern of all fish has been changed, however, as a result of sharp reductions in civilian supplies of canned and cured fish.

During the war there has been a noticeable trend towards increased consumer acceptance of frozen fish. This is particularly true with regard to frozen packaged fillets, which are now widely distributed in inland areas. The post-war possibilities of quick-freezing of fresh and precooked fish appear to be revolutionary for the industry. Increasing interest is also shown by the fishing industry in air transportation as a more efficient method of moving the more perishable fishery products to market, and as a way of expanding markets after the war. In the future a greater variety of fishery products will be made available to the American family, not only in the coastal areas, but throughout the country.

# NET STORAGE MOVEMENT OF FROZEN FISH, UNITED STATES AND ALASKA, 1939-41 AVERAGE, AND 1943-45




SOURCE: WAR FOOD ADMINISTRATION  △ESTIMATE



U. S. DEPARTMENT OF AGRICULTURE  NEG. 45244  BUREAU OF AGRICULTURAL ECONOMICS

## Production and Consumption of Canned Soups and Canned Baby Foods, 1935-45

The production and consumption of commercially canned soups and baby foods in 1945 are expected to be about 2-1/2 times as large as 10 years ago. This tremendous increase is due in large part to the variety, convenience, popular price, and nutritive value of the products. Canned soups made up about three-fourths of the total consumption of canned soups and baby foods in 1944. Civilian consumption of canned soups totaled 865.5 million pounds in 1944, and is expected to be about as large this year. This quantity was 86 percent larger than the 464 million pounds consumed in 1935, but about 10 percent below peak consumption in 1942. The pack of canned soups has been restricted in the past 3 years because of tin and manpower shortages. Further increase in production may be expected after the war although other types of processing may offer considerable competition.

Canned baby foods were practically unknown 10 years ago. Only 12 million pounds were consumed in 1935. Their production and use have increased many times over since 1935. In 1944 total consumption reached 279 million pounds (including purchases for service commissaries in this country.) Although with this year's expected increase, the total may be 29 or 30 times as great as in 1935, the consumption per child under 3 ( the approximate age group) hasn't increased quite so much since there are about 40 percent more children in this age group than in 1935. On a per child basis (children under 3), canned baby food consumption in 1945 may be 44.5 pounds compared with 2.1 pounds in 1935. The basic data are given in Table 13.

Data are not available for a breakdown of the types of soups and baby foods before 1943. In the past 2 years, however, tomato soup has constituted about one-third of the total commercial pack of soups. The composition of baby foods has been about as follows: vegetables, 45%; fruits, 25%; meat compounds, 20%; and desserts 10%.

Table 13.- Canned baby foods and soups, commercial pack: Supply and distribution, calendar years 1935-45

| Years | Canned baby foods | | | Canned soups | | | Total canned soups and baby foods | | |
|---|---|---|---|---|---|---|---|---|---|
| | Pack | Consumption | | Pack | Civilian consumption | | Pack | Civilian consumption | |
| | | Total | Per child under 3 1/ | | Total | Per capita | | Total | Per capita 2/ |
| | Mil. lbs. | Mil. lbs. | Lbs. | Mil. lbs. | Mil. lbs. | Lbs. | Mil. lbs. | Mil. lbs. | Lbs. |
| 1935 | 15.0 | 12.0 | 2.1 | 552.0 | 464.2 | 3.6 | 567.0 | 476.2 | 3.7 |
| 1936 | 24.0 | 21.0 | 3.6 | 600.0 | 540.9 | 4.2 | 624.0 | 561.9 | 4.4 |
| 1937 | 42.0 | 36.0 | 6.0 | 666.0 | 657.5 | 5.1 | 708.0 | 693.5 | 5.3 |
| 1938 | 48.0 | 36.0 | 5.9 | 720.0 | 704.8 | 5.4 | 768.0 | 740.8 | 5.7 |
| 1939 | 111.0 | 81.0 | 13.1 | 885.0 | 834.7 | 6.3 | 996.0 | 915.7 | 7.0 |
| 1935-39 ave. | 48.0 | 37.2 | 6.1 | 684.6 | 640.4 | 4.9 | 732.6 | 677.6 | 5.2 |
| 1940 | 81.0 | 96.0 | 15.3 | 900.0 | 902.3 | 6.8 | 981.0 | 998.3 | 7.5 |
| 1941 | 126.0 | 96.0 | 14.8 | 1,035.0 | 918.7 | 6.9 | 1,161.0 | 1,014.7 | 7.6 |
| 1942 | 165.0 | 153.0 | 22.4 | 840.0 | 968.1 | 7.3 | 1,005.0 | 1,119.1 | 8.5 |
| 1943 | 234.0 | 207.0 | 27.4 | 675.0 | 686.2 | 5.3 | 909.0 | 888.7 | 6.9 |
| 1944 | 315.0 | 279.0 | 35.1 | 891.0 | 865.5 | 6.7 | 1,206.0 | 1,140.4 | 8.8 |
| 1945 3/ | 360.0 | N.A. | 44.5 | 885.0 | N.A. | 6.6 | 1,245.0 | N.A. | 9.4 |

1/ Approximate age group.
2/ Total population eating out of civilian food supplies used to complete per capita consumption.
3/ Preliminary.

Table 14.- Production of major food commodities, calendar years, 1935-39 average, 1942, 1943, 1944 and 1945 with percentage comparisons 1/ - Continued

| Commodity | Unit | Average 1935-39 | 1942 | 1943 | 1944 | 1945 | 1945 as a percentage of 1935-39 | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|---|---|---|
| Meats (dressed weight) | Mil.lb. | | | | | | | |
| Beef | " | 6,936 | 8,831 | 8,523 | 9,137 | 9,590 | 138 | 105 |
| Veal | " | 1,038 | 1,139 | 1,160 | 1,595 | 1,640 | 158 | 103 |
| Lamb and mutton | " | 871 | 1,045 | 1,104 | 1,023 | 930 | 107 | 91 |
| Pork (excluding lard) | " | 7,337 | 10,723 | 13,349 | 12,893 | 10,300 | 140 | 80 |
| Total meats | " | 16,182 | 21,738 | 24,136 | 24,648 | 22,460 | 139 | 91 |
| Poultry Products | | | | | | | | |
| Eggs | Mil.doz. | 3,335 | 4,430 | 4,972 | 5,305 | 4,885 | 146 | 92 |
| Chicken (dressed weight) | Mil. lb. | 2,325 | 2,988 | 3,804 | 3,460 | 3,200 | 138 | 92 |
| Turkey (dressed weight) | " | 350 | 496 | 466 | 547 | 575 | 164 | 105 |
| Dairy Products | | | | | | | | |
| Total milk 2/ | " | 103,656 | 118,777 | 17,687 | 118,504 | 119,530 | 115 | 101 |
| Cheese 3/ | " | 669 | 1,112 | 993 | 1,009 | 1,085 | 162 | 108 |
| Cond. and Evap. milk | " | 2,225 | 3,782 | 3,343 | 3,758 | 3,910 | 176 | 104 |
| Fluid milk and cream 4/ | " | 44,146 | 49,514 | 53,921 | 56,144 | 57,240 | 130 | 102 |
| Fats and Oils 5/ | | | | | | | | |
| Butter, farm & factory | " | 2,170 | 2,130 | 2,014 | 1,816 | 1,740 | 80 | 96 |
| Lard 6/ | " | 1,624 | 2,398 | 2,916 | 2,974 | 2,150 | 132 | 72 |
| Margarine (fat content) | " | 303 | 347 | 500 | 479) | | | |
| Shortening | " | 1,529 | 1,300 | 1,438 | 1,363 ( | 2,900 | | |
| Other edible fats and oils 7/ | " | 580 | 1,074 | 1,283 | 1,131 ) | | | |
| Total fats and oils | " | 6,206 | 7,249 | 8,151 | 7,763 | 6,790 | 109 | 87 |
| Fruits | | | | | | | | |
| Fresh: | | | | | | | | |
| Citrus | " | 6,870 | 8,333 | 8,838 | 10,095 | 10,155 | 148 | 101 |
| Apples (commercial) | " | 4,384 | 4,052 | 3,122 | 4,304 | 3,912 | 89 | 91 |
| Other (excluding melons) | " | 4,807 | 4,896 | 3,558 | 5,543 | 4,682 | 97 | 84 |
| Total fresh | " | 16,061 | 17,281 | 15,518 | 19,942 | 18,749 | 117 | 94 |
| Processed: | | | | | | | | |
| Canned fruit | " | 1,666 | 2,226 | 1,587 | 2,065 | 2,074 | 124 | 100 |
| Canned fruit juices | " | 321 | 859 | 1,390 | 1,606 | 1,741 | 542 | 108 |
| Frozen | " | 106 | 221 | 221 | 330 | 320 | 302 | 97 |
| Dried | " | 1,127 | 1,045 | 1,388 | 1,162 | 1,085 | 96 | 93 |

- Continued

Table 14.- Production of major food commodities, calendar years, 1935-39 average, 1942, 1943, 1944 and 1945 with percentage comparisons 1/ Continued -

| Commodity | Unit | Average 1935-39 | 1942 | 1943 | 1944 | 1945 | 1945 as a percentage of 1935-39 | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 8/ | Mil.lb. | 30,498 | 34,161 | 31,665 | 34,169 | 33,782 | 111 | 99 |
| Canned 9/ | " | 4,084 | 6,839 | 6,233 | 6,338 | 6,313 | 155 | 100 |
| Frozen | " | 10/ 78.3 | 162.6 | 223.3 | 235.6 | 259.0 | 331 | 110 |
| Potatoes | " | 359 | 371 | 461 | 329 | 389 | 108 | 103 |
| Sweetpotatoes | " | 68 | 66 | 73 | 72 | 60 | 88 | 83 |
| Dry edible beans 11/ | " | 1,361 | 1,755 | 1,935 | 1,502 | 1,500 | 110 | 100 |
| Canned soups and baby foods 12/ | " | 48.0 | 165.0 | 234.0 | 315.0 | 360.0 | 750 | 114 |
| Sugar, raw basis | 1,000 short tons | 1,948 | 2,141 | 1,531 | 1,512 | 1,818 | 93 | 120 |
| Grains | | | | | | | | |
| Wheat | Mil. bu. | 759 | 974 | 841 | 1,079 | 13/ 1,101 | 145 | 102 |
| Rye | " | 44.9 | 57.7 | 30.5 | 25.9 | 13/ 29 | 65 | 112 |
| Rice, milled | " | 49.8 | 64.5 | 64.8 | 70.2 | 71.0 | 143 | 101 |
| Corn | " | 2,316 | 3,132 | 3,034 | 3,228 | 3,120 | 135 | 97 |
| Oats | " | 1,045 | 1,350 | 1,138 | 1,166 | 1,358 | 130 | 116 |
| Barley | " | 239 | 429 | 324 | 284 | 243 | 102 | 86 |
| Peanuts | Mil.lb. | 1,229 | 2,212 | 2,185 | 2,178 | 2,107 | 171 | 97 |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year: canned fruits, canned vegetables, and dried fruits which are on a pack-year basis; potatoes and sweetpotatoes, on the basis of a year beginning July 1. 2/ The production of total milk for human consumption differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed to calves and milk produced off farms are usually of approximately equal volume. 3/ Excluding full skim, cottage, pot, and bakers' cheese. 4/ Fluid milk equivalent for fresh use. 5/ Fat content basis except for butter which is on an actual weight basis. 6/ Excluding amount used in manufactured products. 7/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products, and other minor uses such as fish canning. 8/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 9/ Includes asparagus, benas (lima) beans (snap), beets, carrots, corn, hominy, kraut, (including bulk) peas, pickles, (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup, and chili sauce, mixed vegetables. 10/ Average 1937-39. Data prior to 1937 are not available. 11/ Cleaned basis. 12/ New series, see Table 13. 13/ For revised data, see the crop report of May 10, 1945.

Table 15.- Retail food prices and total cost of living, United States, by months, 1942-45

(Index numbers 1935-39 = 100)

| Year and month | Meats | Eggs | Dairy products | Fats and oils | Cereals and bakery products | Fruits and vegetables: Fresh | Fruits and vegetables: Canned | Fruits and vegetables: Dried | Sugar and sweets | Beverages | All foods | Total cost of living |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1942 | 126 | 136 | 125 | 120 | 105 | 133 | 122 | 136 | 127 | 122 | 124 | 116 |
| Apr. | 122 | 111 | 122 | 120 | 105 | 126 | 122 | 131 | 128 | 123 | 120 | 115 |
| May | 124 | 115 | 123 | 122 | 105 | 130 | 123 | 131 | 127 | 125 | 122 | 116 |
| June | 127 | 120 | 122 | 120 | 105 | 137 | 122 | 133 | 127 | 123 | 123 | 116 |
| July | 128 | 130 | 123 | 120 | 105 | 139 | 122 | 134 | 127 | 123 | 125 | 117 |
| Aug. | 130 | 146 | 126 | 120 | 105 | 135 | 123 | 139 | 127 | 124 | 126 | 118 |
| Sept. | 131 | 155 | 128 | 121 | 105 | 130 | 124 | 143 | 127 | 124 | 127 | 118 |
| Oct. | 131 | 165 | 131 | 121 | 106 | 139 | 125 | 150 | 127 | 124 | 130 | 119 |
| Nov. | 132 | 166 | 132 | 124 | 106 | 145 | 127 | 150 | 127 | 125 | 131 | 120 |
| Dec. | 133 | 167 | 132 | 125 | 106 | 151 | 128 | 150 | 128 | 124 | 133 | 120 |
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| Jan. | 135 | 166 | 134 | 126 | 106 | 147 | 129 | 154 | 127 | 124 | 133 | 121 |
| Feb. | 136 | 144 | 136 | 126 | 106 | 153 | 131 | 156 | 127 | 125 | 134 | 121 |
| Mar. | 137 | 142 | 137 | 126 | 107 | 173 | 132 | 157 | 128 | 125 | 137 | 123 |
| Apr. | 138 | 141 | 137 | 127 | 108 | 191 | 132 | 158 | 128 | 125 | 141 | 124 |
| May | 138 | 142 | 137 | 126 | 108 | 206 | 131 | 158 | 128 | 124 | 143 | 125 |
| June | 138 | 146 | 134 | 126 | 108 | 202 | 130 | 158 | 126 | 124 | 142 | 125 |
| July | 131 | 154 | 133 | 126 | 108 | 193 | 130 | 159 | 126 | 124 | 139 | 124 |
| Aug. | 130 | 167 | 133 | 126 | 108 | 179 | 130 | 160 | 127 | 125 | 137 | 123 |
| Sept. | 130 | 178 | 134 | 126 | 108 | 176 | 130 | 160 | 127 | 125 | 137 | 124 |
| Oct. | 131 | 190 | 134 | 126 | 108 | 175 | 130 | 162 | 127 | 125 | 138 | 124 |
| Nov. | 130 | 191 | 134 | 125 | 108 | 170 | 130 | 162 | 127 | 125 | 137 | 124 |
| Dec. | 131 | 181 | 134 | 124 | 108 | 172 | 130 | 162 | 127 | 125 | 137 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Jan. | 131 | 154 | 134 | 124 | 108 | 175 | 130 | 163 | 127 | 124 | 136 | 124 |
| Feb. | 130 | 143 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Mar. | 131 | 135 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Apr. | 130 | 128 | 134 | 124 | 108 | 178 | 130 | 163 | 127 | 124 | 135 | 125 |
| May | 130 | 127 | 134 | 123 | 108 | 183 | 129 | 164 | 126 | 124 | 136 | 125 |
| June | 130 | 129 | 134 | 123 | 108 | 185 | 129 | 164 | 126 | 124 | 136 | 125 |
| July | 129 | 149 | 134 | 123 | 109 | 188 | 129 | 165 | 127 | 124 | 137 | 126 |
| Aug. | 129 | 159 | 134 | 123 | 108 | 187 | 129 | 165 | 126 | 124 | 138 | 126 |
| Sept. | 129 | 158 | 134 | 123 | 109 | 179 | 129 | 165 | 126 | 124 | 137 | 126 |
| Oct. | 129 | 179 | 134 | 123 | 109 | 170 | 130 | 166 | 126 | 124 | 136 | 126 |
| Nov. | 130 | 187 | 134 | 123 | 109 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Dec. | 130 | 188 | 134 | 123 | 109 | 164 | 130 | 166 | 126 | 124 | 137 | 127 |
| 1945 | | | | | | | | | | | | |
| Jan. | 130 | 170 | 134 | 123 | 109 | 178 | 130 | 167 | 126 | 124 | 137 | 127 |
| Feb. | 131 | 153 | 134 | 124 | 109 | 178 | 130 | 167 | 126 | 124 | 136 | 127 |
| Mar. 1/ | 131 | 141 | 134 | 124 | 109 | 179 | 130 | 167 | 126 | 124 | 136 | 127 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Preliminary.

# THE National Food SITUATION

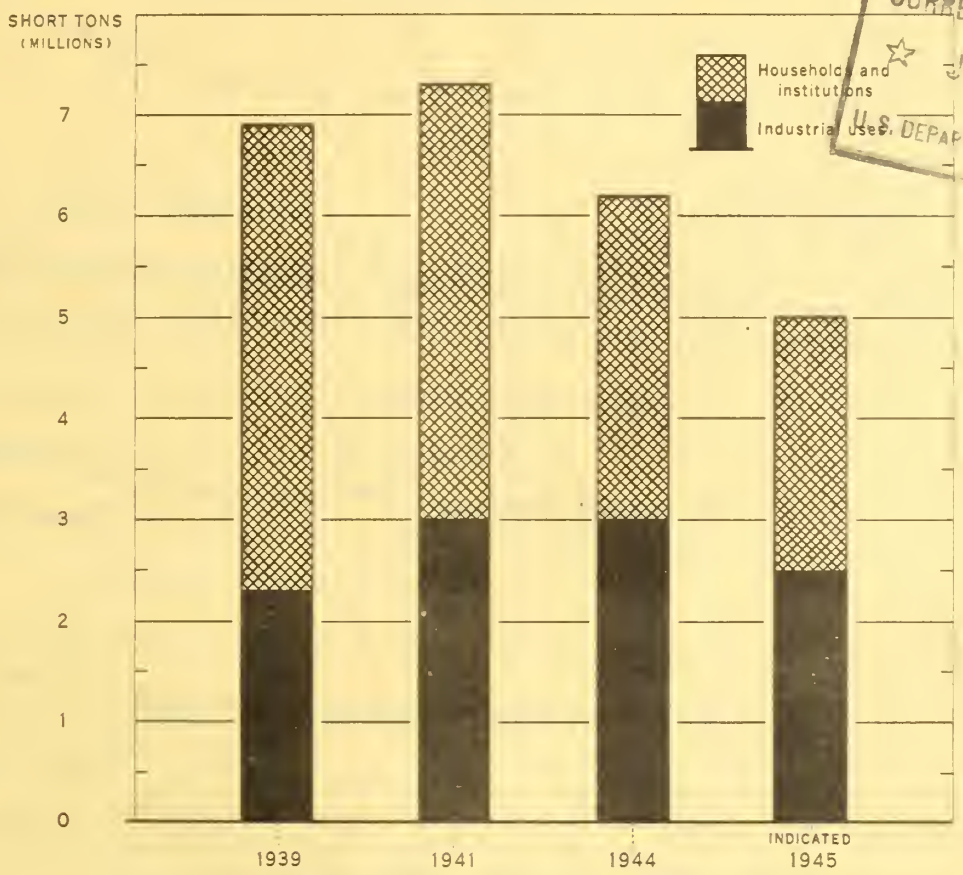
BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-26 BAE JUNE 1945

LIBRARY
CURRENT SERIAL RECORD
JUL 7 1945
U.S. DEPARTMENT OF AGRICULTURE

CIVILIAN SUGAR CONSUMPTION BY HOUSEHOLDS AND INSTITUTIONS, AND BY INDUSTRIAL USERS*, UNITED STATES, 1939, 1941, 1944, AND INDICATIONS FOR 1945

(CANE AND BEET, RAW BASIS)



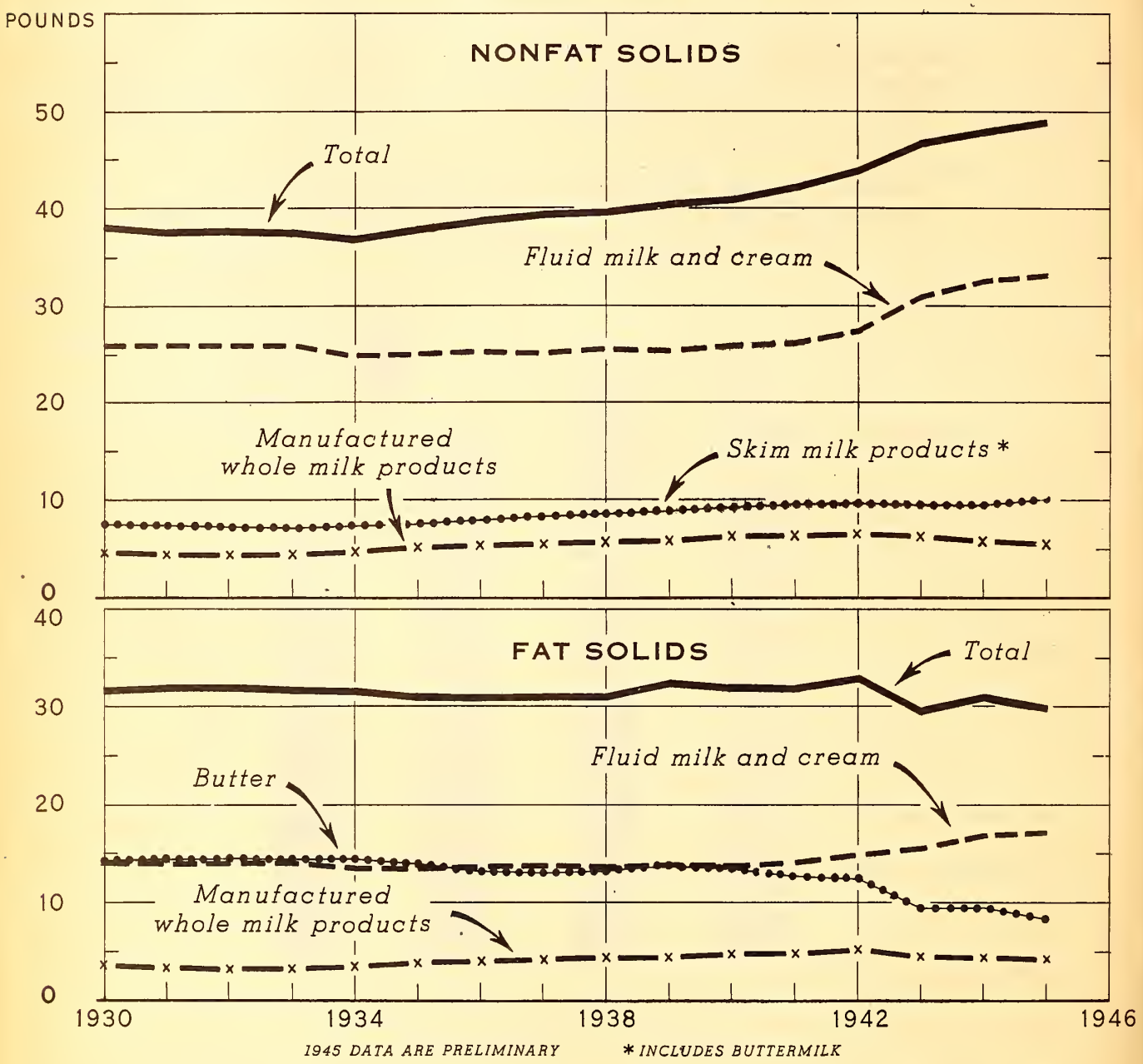

*INDUSTRIAL USE, 1939 FROM CENSUS MANUFACTURES, 1941 BASED ON DATA REPORTED BY USERS TO OPA; 1945 OPA DATA. 1945 INDICATIONS DERIVED FROM OPA QUOTAS

U. S. DEPARTMENT OF AGRICULTURE NEG 45354 BUREAU OF AGRICULTURAL ECONOMICS

Total civilian sugar consumption was about 450,000 short tons higher in 1941 than in 1939, but use of sugar by food industries, as estimated from reports to the Office of Price Administration, increased more than 650,000 short tons. Industrial uses accounted for one third of the total civilian sugar consumption in 1939 and over 40 percent in 1941. Much of the increase was due to increased consumer demand for beverages, candy, sweet baked goods, ice cream, etc. Total civilian sugar supplies were about 16 percent smaller in 1944 than in 1941, but industrial usage continued about as large, representing nearly half of total consumption. Sugar consumption by households and institutions (i.e. restaurants, hotels, etc.) was reduced 27 percent from 1941 to 1944. It appears that the proportionate distribution of civilian supplies in 1945 will be about the same as in 1944, on the basis of allocations for the first 3 quarters.

# CIVILIAN PER CAPITA CONSUMPTION OF FAT AND NONFAT MILK SOLIDS, UNITED STATES, 1930-45

(ACTUAL WEIGHT OF SOLIDS)




*1945 DATA ARE PRELIMINARY* * *INCLUDES BUTTERMILK*

U. S. DEPARTMENT OF AGRICULTURE NEG. 45353 BUREAU OF AGRICULTURAL ECONOMICS

# THE NATIONAL FOOD SITUATION

In This Issue


| | Page |
|---|---|
| General Summary | 3 |
| Commodity Reviews | 5 |
| Changes in the Civilian Consumption of Sugar since 1939 | 10 |
| Civilian Per Capita Consumption of Fat and Non-Fat Milk Solids, 1930-45 | 13 |
| Review of Shipments of Agricultural Commodities to Soviet Russia | 17 |


## SUMMARY


Civilian supplies of meats, fats and oils, rice, sugar, and sweet baked goods will be much shorter this summer than last. But supplies of fresh vegetables and fruits, fresh fish, most cereal products, fluid milk, and skim milk products will be sufficient to meet heavy civilian demand. Civilian egg supplies will be about as large in total as last year, but the demand for eggs has increased considerably because of shortages of other high protein foods.

Total meat production in July-September this year may be down 5 to 10 percent from the output of the third quarter of 1944. Reduction in pork output will be partly offset by increased output of beef and veal. Civilian supplies this summer will continue to reflect the smaller total production of meat and larger military takings than last year. Exports of meat this summer will be very small. Reduced hog slaughter has cut lard output materially and has resulted in a very tight fats and oils situation, both over-all and civilian. Butter supplies for civilians are somewhat smaller than last summer, but regional distribution appears to be better. Restrictions on sales of fluid milk have been temporarily relaxed. With record milk production,

civilians will have plentiful supplies of fluid milk and larger supplies of fluid cream than last summer. Cottage and other skim milk cheeses, chocolate milk, and buttermilk will also be available in larger quantities than last year to meet increased demand.

Prospects for supplies of commercial fresh fruits and vegetables this summer are as good as last year. According to June 1 reports, the condition of the apple crop is poor, but the 1945 deciduous fruit crops other than apples may be about as large in total as the above-average crops of 1944. Commercial truck crop production of fresh vegetables for marketing this summer may set a new record, but demand will be up even more. Families growing their own vegetables in Victory Gardens will be much less dependent than others on commercial vegetable supplies.

Supplies of most cereal products will continue large enough to meet demand. Some reduction in supplies of cakes, sweet rolls, and other bakery products requiring large quantities of sugar and fats may be expected as the result of shorter supplies of those ingredients. Civilian rice supplies will be smaller in coming months than last year, reflecting heavy military procurement. However, supplies of other cereal products will be increased to meet greater consumer demand.

The civilian per capita consumption of sugar was reduced from 98 pounds in 1939 to 89 pounds in 1944, and may be only 72 pounds this year. On the basis of data from the 1939 Census of Manufactures, about 1/3 of the 1939 civilian sugar supply was used by the food industries, with the remaining 2/3 being used by households and institutions (i.e., restaurants, hotels, etc.). The distribution pattern had changed somewhat by 1941 when consumer purchasing power was higher. According to the reports of industrial use of sugar in 1941 submitted to the Office of Price Administration, a little over 40 percent of

the 1941 civilian sugar supply was used by the food industries manufacturing beverages, candy, sweet goods, ice cream, etc. Present indications are that about half of the available civilian supply for 1945 is going to households and institutions and half to industrial users.

Civilian consumption of total milk solids has increased from about 69 pounds per capita (actual weight of solids) in the 1930's to over 78 pounds per capita in 1944 and 1945. The increase has been in consumption of the non-fat solids, i.e., proteins, minerals, and lactose -- from 37 or 38 pounds per capita in the period 1930-36, to about 49 pounds in 1945. Civilian consumption of fat solids -- butterfat -- changed comparatively little until 1943, when decreased butter production and heavy noncivilian purchases reduced civilian butter supplies.

The United States has shipped about 8-1/2 billion pounds of agricultural commodities, mostly food, to Soviet Russia under lend-lease since we entered the war in December 1941. Practically all of the foods shipped was used for the Red Army or for clinical treatments, according to reports from Russian sources.

-- June 25, 1945

## COMMODITY REVIEWS

### Meats

There has been no significant change during the past month in the outlook for total civilian supplies of meats in the near future, although special programs to improve distribution of the available supplies have been instituted. Meat supplies for civilians probably will remain at a very low level through the summer and early fall. Meat production will increase seasonally during the last quarter of the year, but increased noncivilian purchases for war uses, now indicated, probably will take most of the increased output.

The spring movement of cattle to the Corn Belt for feeding continued relatively large. Marketings of both grain-fed and grass-fat cattle during the last 6 months of 1945 are expected to be greater than a year earlier. Lamb and mutton production during the first half of 1945 was an all-time high for the season. Sheep slaughter was larger than the large kill a year earlier so mutton made up a relatively large proportion of the total lamb and mutton output. Production of lamb during the last half of the year probably will be smaller than in the last half of 1944, reflecting the reduced lamb crop this spring.

The 1945 spring pig crop has been estimated at 52 million head, 7 percent less than a year earlier but 12 percent greater than the average for 1933-42. The record 1943 spring pig crop amounted to 74 million head. With this spring pig crop and prospective large cattle slaughter, total meat production this fall and winter may be as large as in the comparable months of 1944-45 if the average weight of hogs slaughtered continues high. The indications for the fall pig crop are based on an analysis of farmers' intentions for fall farrowings. According to these intentions, about 12 percent more sows will farrow this fall than last and the fall pig crop would be the fourth largest on record. If the indicated sharp increase in the 1945 fall pig crop materializes and if cattle slaughter is as large next year as this year, meat production in the late spring and summer of 1946 would be larger than current production.

On June 1 the Office of Price Administration announced a plan to supplement the previous meat control orders in order to obtain better geographical distribution of civilian meat supplies. The new plan, effective about mid-June, requires all livestock slaughterers to distribute their civilian meat supplies into the same counties where they supplied meat in the first quarter of 1944 and in about the same proportion. In 1944 civilian supplies of meat were large, and geographical distribution of the civilian meat supply was about normal.

Set-asides of Army style beef (excluding canner and cutter beef) for Government purchase were decreased from 50 percent in June to 30 percent in July. Additional, but small reductions in pork, veal, and lamb set-asides from those announced in early June were also made. However, purchases by the armed forces continue larger than in the same periods of 1944. Differential set-asides for beef and pork have been developed so that federally inspected slaughterers whose current slaughter is large, when compared to that of June 1944, are required to set-aside for Government purchase a larger proportion of their output than slaughterers whose current kill is relatively small.

Poultry and Eggs

Civilian egg supplies for the country as a whole will be about as large this summer as last. Egg production is moderately below last year's record, but much smaller quantities of eggs are being dried to meet noncivilian needs. Eggs now being dried will be taken to meet military needs.

The regional distribution of total civilian egg supplies varies considerably. The North and South Atlantic States have been producing in the past few years only about two-thirds of the quantity of eggs which they consume. They ordinarily depend on heavy shipments of eggs from the Midwest, particularly in the second half of the year. Because of the marked wartime increase in population, the Pacific Coast States have also become quite dependent on shipments from other areas. The Midwest normally produces from 2 to 3 times as many eggs as it consumes. Now, the pattern of regional egg distribution is complicated by greatly increased egg consumption in the surplus producing areas, along with heavy military procurement in those areas. Shipments to deficit producing areas have been materially reduced. Furthermore, in the past 2 months the wholesale egg dealers and distributors in the deficit producing areas of the North Atlantic and Pacific have been required to make deliveries of eggs to the Army under priorities. Thus, civilian egg supplies are much smaller in these areas than they were a year earlier.

Civilian chicken consumption is averaging lower than last year because of heavy military procurement. Production of chicken meat is increasing seasonally, but for the year as a whole will be less than last year. The reduced slaughter of farm chickens this year compared with last is only partly offset by increased commercial broiler production. As with eggs, the production of poultry meat varies between areas. Such areas as the Northeast are usually net importers. Shipments into such areas are greatly reduced by increased civilian consumption in normally surplus producing areas and by large military takings. WFO 119 virtually prohibits the sales to civilian consumers of commercial broilers produced in important producing areas in ten States -- Delaware, Maryland, Virginia, West Virginia, North Carolina, Oklahoma, Missouri, Arkansas, Kansas, and Georgia. In 1943, almost 75 percent of the receipts of live poultry in Philadelphia, and 40 percent in New York City were from the Del-Mar-Va peninsula and the Shenandoah Valley. About 60 percent of the total commercial broiler production is now under the jurisdiction of the Order.

Dairy Products

Record milk production has permitted the temporary relaxation of War Food Order 79, so that civilians are able to consume fluid milk at the highest rate in history. The order limits sales of fluid milk in 138 metropolitan areas, covering about 50 percent of the fluid milk distributed. The fluid cream provisions of the order have also been relaxed temporarily. Civilian consumption of fluid cream is ahead of 1944, but still below the prewar average.

With no limitations on the utilization of skim milk, except the set-aside on dried skim produced by the spray process, consumption of skim milk byproducts such as cottage cheese, chocolate milk, and buttermilk is also very high.

Manufactured dairy products, however, continue short of civilian demand, even though the production of most of them except butter is at or near a record high. Set-aside percentages for Government purchase on butter and cheese are higher than last year in order to fill noncivilian needs. The butter set-aside for July is 50 percent. Cheddar cheese manufacturers are required to offer to the Government 65 percent of their July output of Cheddar cheese. Although civilian butter supplies are below last year, there appears to be a better regional distribution.

Two other recent Government actions affecting the utilization of milk were as follows:

(1) Ice cream manufacturers during June were permitted to use for civilian consumption 75 percent of the butterfat utilized in the base period, compared with 65 percent in previous months.

(2) War Food Order 92, which limits the production of cheeses other than Cheddar, was temporarily suspended for the period June 8 to July 15. This means that civilians will probably get increased supplies of cheeses other than Cheddar.

Fats and Oils

The civilian fats and oils situation will continue tight at least until late spring or summer of 1946. Stocks of lard are at bare minimum working levels this summer; all takings, whether for the military, for export, or for use by civilians, must come out of current production. Lard production in July-September is expected to be about 25 percent below the same quarter's production last year. Because supplies for civilians will be so short, ration point values on lard, as well as shortening and edible oils, were raised to 12 points per pound on June 17.

Civilian butter supplies are below last year, but there appears to be a better regional distribution. During the first 5 months of 1945, production has averaged 6 percent below the comparable period of 1944, and higher percentage set-asides for Government purchase are being required.

Shortages of butter and lard are resulting in increased demands, both civilian and noncivilian for margarine, shortening, and cooking and salad oils. Use of fats and oils in the manufacture of these products for civilians is restricted by manufacturers' quotas based on use in comparable periods of 1944, in the case of margarine, and average use in comparable periods of 1940 and 1941, in the case of shortening and oils. Effective April 1, manufacturers' quotas for civilian shortening and salad and cooking oils were reduced from 88 percent to 80 percent of base-period use, and those for margarine were reduced to 110 percent of base-period use.

Fruit

Fresh fruit supplies during the summer months will consist principally of deciduous fruits, supplemented by relatively large supplies of California Valencia oranges and lemons. Prospects on June 1 were for a deciduous fruit crop, excluding apples, in 1945 about as large in the aggregate as the above-average 1944 crop.

Among the fresh deciduous fruits available in large quantities in early summer are peaches. The peach crop this year is indicated to be slightly larger than the big 1944 crop and about 37 percent larger than the 10-year (1934-43) average production. Large peach crops are in prospect this year in the western and southern States, notably in California, Georgia, and South Carolina. Peach crops are expected to be short, however, in some of the northeastern and midwestern States, because of cold, wet weather in April and May. In these areas more of the market supplies of peaches than usual will be shipped in for fresh use and home canning.

The apricot crop is expected to be much smaller than last year's very large crop, but still about average in size. Production of sweet cherries is expected to be slightly larger this year than last, but that of sour cherries substantially smaller. Prospective production of plums in California is considerably smaller this year than last, but the production of prunes for drying is indicated to be substantially larger. The pear crop, most of which is grown in the three Pacific Coast States, is expected to be nearly as large as the above-average crop last year. Another large grape crop is in prospect.

Total production of commercial apples may be no larger than the short 1943 crop and well below the good 1944 crop. The apple crop is expected to be very short in the eastern two-thirds of the United States but average or slightly larger in the western States.

## Vegetables

Fresh vegetable supplies from commercial truck crop production for marketing in the earlier part of the summer may be 5 percent larger in aggregate tonnage than comparable 1944 production, and 16 percent above the 1934-43 average. Compared with last year, supplies in the early summer period this year will be about 3 percent greater for cabbage, 10 percent greater for beets, cantaloups and watermelons, and about 40 percent greater for green peppers. On the other hand, supplies of snap beans, cucumbers, lettuce, and onions may be significantly smaller in this period, according to June 1 indications. Supplies of early summer tomatoes may be slightly below those for the same period of last year but will be well above average.

Unfavorable weather in May delayed maturity and harvesting in some areas, but total supplies of all commercial truck crops for the fresh market this spring were slightly above the 1944 tonnage for the same period, and nearly one-fifth larger than the 1934-43 average spring tonnage.

If early season intentions of growers are carried out, the acreage of 11 major truck crops for processing may be 5 percent larger than last year's aggregate planted acreage and will establish a new record. The crop of commercial early Irish potatoes, this year is estimated to be of record large size.

## Food Grains

A wheat crop of 1,085 million bushels is indicated on the basis of June 1 condition and estimated acreage. If a crop of this size is realized, it would top last year's record slightly, and would be third United States crop of over a billion bushels. The prospect of another large crop assures ample supplies for European relief shipments, large exports, and considerable utilization for industrial alcohol production, as well as for domestic food and feed. If the crop turns out about as now indicated, the total prospective disappearance may be taken care of by current production without reducing the carry-over July 1, 1946, from the above-average carry-over of July 1, 1945. Per capita consumption of wheat in all food products by civilians in 1945-46 probably will continue at about the 1944 level of 231 pounds, grain equivalent.

The rye crop was indicated at 28.1 million bushels, on the basis of June 1 condition and estimated acres for harvest. This is above the 25.9 million bushels produced in 1944, but below the 10-year (1934-43) average of 41.4 million bushels. With a carry-over on July 1, 1945 estimated at about 14 million bushels, total supplies would be adequate to meet prospective domestic requirements and substantial export demands. Per capita consumption in 1945 may be about 2.5 pounds of rye flour compared with about 2.8 pounds in 1944. This reduction in consumption reflects the shortage of manpower for rye bread making.

The new crop indication for rice will not be available until July 10. As indicated in March, if growers' intentions are carried out and if yields are about average, production in 1945 may be expected to reach about 71 million bushels. While a crop of this size would set a new record, demands for military and civilian food in the Orient are so great that civilian consumption out of the 1945 crop will be considerably below average.

## CHANGES IN THE CIVILIAN CONSUMPTION OF SUGAR SINCE 1939

The civilian consumption of cane and beet sugar averaged 98 pounds per capita, refined basis, in 1939. The rate of consumption dropped slightly in 1940 to 95 pounds, then increased sharply to 104 pounds per capita in 1941. Sugar rationing began in May 1942. In 1942, receipts from foreign sources declined by 2 million tons. Civilian consumption averaged 86 pounds per capita in 1942 and 80 pounds in 1943. In 1944 consumption by United States civilians was up 10 percent over the previous year, to 89 pounds per capita, despite heavy military takings. This was the result of smaller WFA shipments to other countries, a 15 percent increase in receipts from foreign sources and about a 24 percent reduction in stocks.

In 1945, estimated civilian sugar supplies will average about 72 pounds per capita. Stocks are at a minimum working level; total Cuban supplies are smaller than last year; military takings for troop use show an increase; and War Food and military shipments to liberated areas will be much larger than last year.

The industrial use of sugar reported in the 1939 Census of Manufactures accounted for about 1/3 of the civilian sugar supply in 1939. (Table 1.) However, the 1939 census reports of industrial users were somewhat incomplete because firms with less than $5,000 gross sales were excluded. Total civilian sugar consumption reached a new record in 1941 and the industrial use of sugar was much larger than in 1939. The best available data for estimating the amount of sugar used by food industries in 1941 are the reports of sugar used submitted to the Office of Price Administration as the basis for sugar rationing. These may have been inflated somewhat by including purchase for stocks. The estimates of 1941 use are given in Table 1. Much of the increased industrial use probably was due to the fact that consumer purchasing power was much higher in 1941 than in 1939, and people bought more candy, ice cream, baked goods, soft drinks, etc. Also, population shifts from rural to urban areas and the increase in the number of women employed in industry contributed to greater demand for manufactured products.

According to preliminary estimates of the Office of Price Administration -- based on allotments issued, industrial use of sugar for products for civilian consumption was about as large in 1944 as in 1941. 1/ The consumption of sugar in manufactured products in 1944 apparently accounted for about half of total civilian sugar consumption. Allocations for the first 3 quarters of 1945 indicate that sugar distribution between industrial users and institutions and households remains substantially the same as in 1944. With a total civilian supply of 5 million tons the total direct use of sugar by households, restaurants, hotels and other institutions would be 45 percent less than their 1939 use, whereas total industrial use in such manufactured products as candy, baked goods, canned goods, and dairy products would be 7 percent greater than the total reported in 1939.

In 1944, the household ration of sugar per capita amounted to half a pound per week. In addition, the purchase of 25 pounds of sugar per person for home canning was permitted. Home canning has increased materially during the war. Because of a 650,000 ton drop in direct supplies for homes and institutions in 1945 compared with 1944, the household ration was reduced on February 1, 1945 to .393 pounds per capita per week and on May 1 to .285 pounds per week.

1/ In addition, the various industries used large quantities of sugar for products sold to the U. S. military and war services.

The maximum ration for home canning, including home canning of fruits, has been announced at 15 pounds per capita, but not more than 120 pounds per family. This ration will be issued by local boards, and only 5 pounds per capita may be issued for canning vegetables or making jams, jellies, relishes, catsup, etc., but not including home-canned fruits.

Apparently, no data are available to indicate the total amount of sugar used in institutions such as restaurants, hotels, sanitariums. However, the number of meals served in public eating places has increased greatly. Institutional use of sugar has been directed by means of allotments based on the amount of baking done, number of meals served, and amount of sugar used in the base period. From May 1 to December 31, 1944 each institution's allotment was either .03, .04, or .05 pounds per person per meal depending on the amount of baking done, or 100 to 120 percent of the quantity used in the base period, December 1942 (a period of rationed usage), again depending on the amount of baking done, whichever was smaller. These allowances were reduced on January 1, 1945 to 85 percent of the May-December 1944 rates for institutions doing no baking and to 90 percent for others. On May 1, 1945, they were cut to 70 percent and 75 percent of the May-December 1944 rates. Beginning July 1, 1945 the allotments will be on the basis of the rates per person per meal of .015, .022, .03 pounds, or 100 to 120 percent of ration base period use (60 to 72 percent of pre-ration use), whichever is smaller.

Quotas for the use of sugar by most food industries have been based on the quantities used in 1941. The industrial use of sugar in 1941 was 28 percent greater than in 1939, according to estimates based on reports submitted to the Office of Price Administration for 1941 and the 1939 Census of Manufactures. Production of manufactured foods containing sugar increased materially from 1939 to 1941, and because of increasing consumer demand and rising prices in 1941, substantial quantities of sugar were set aside for future use in view of the uncertainties of the war period. However, the reports to the OPA covered use only, not increases in stocks. In 1944, quotas for purchase of sugar for most industrial uses were set at 80 percent of the quantity used in 1941, with additional allotments for provisional users. Pharmaceutical manufacturers were permitted 125 percent of their usage in the base period. Supplementary quotas were issued for manufacturers in areas with greatly increased population because of war work. In the first quarter of 1945 the quota was cut from 80 percent to 70 percent of base usage, for industries except those making bread, bakery and other cereal products. A further reduction was made for the second quarter, to 65 percent with the exceptions of the bread, bakery, cereal product industries (75 percent), ice cream and other dairy products (70 percent), and pharmaceuticals (120 percent). Allotments for the third quarter were again reduced, to 50 percent of the base use, except that manufacturers of breads, bakery products and cereals are to receive 60 percent of their base, and pharmaceuticals 110 percent.

Certain types of industrial users have been allotted sugar according to the quantities of their products. Among these "provisional uses" were canned fruits and vegetables, meat packing, bulk sweetened condensed milk, and jams, jellies and preserves. The use of sugar in jams, jellies, preserves has been taken off the provisional basis for 1945.

If the distribution of the available civilian supplies during the last quarter of 1945 should follow the pattern of the third quarter for civilian distribution, the industries manufacturing bread, baked goods, and other cereal products would use in 1945 substantially the same total quantity of sugar that they reported as used in 1939; the beverage industries would use 12 percent more than 1939 usage; the candy, chocolate, and cocoa group - 18 percent less; manufacturers of ice cream, ices, and other dairy products; and the industries canning, bottling, drying, and freezing fruits, and making jams, preserves, etc. would use over 40 percent more than their total for 1939 as reported in the Census of Manufactures.

Table 1.- Estimated civilian sugar consumption by households, institutions, and major industry groups, 1939, 1941, 1944 and indications for 1945
(Cane and beet - raw basis)

| | 1939 | 1941 | 1944 | Indicated 1945 | |
|---|---|---|---|---|---|
| | | | | Quantity | As percent of 1939 |
| | 1,000 tons | 1,000 tons | 1,000 tons | 1,000 tons | Percent |
| Total civilian sugar consumption | 6,908 | 7,350 | 6,157 | 5,000 | 73 |
| Households and institutions | 1/4,571 | 1/4,350 | 1/ 3,157 | 1/2,500 | 55 |
| Industrial uses - total | 2/2,337 | 3/3,000 | 4/ 3,000 | 5/2,500 | 107 |
| Bread, baked goods and other cereal products | 630 | 750 | 700 | 650 | 103 |
| Bottled beverages, extracts, sirup | 535 | 800 | 750 | 600 | 112 |
| Candy, chocolate, etc. | 550 | 625 | 600 | 450 | 82 |
| Ice cream, ices, other dairy products 6/ | 175 | 250 | 300 | 250 | 143 |
| Canned, frozen, and other bottled foods 7/ | 247 | 350 | 450 | 350 | 142 |
| Other 8/ | 200 | 225 | 200 | 200 | 100 |
| Percentage of total civilian consumption | | | | | |
| Households and institutions | 66 | 59 | 51 | 50 | |
| Industrial uses | 34 | 41 | 49 | 50 | |
| Civilian consumption of sugar, per capita, refined basis - pounds | 98.0 | 103.6 | 89.0 | 72 | 73 |

1/ Residual after subtracting estimated industrial usage from total civilian consumption.
2/ Census of Manufactures, 1939. Excludes use by firms with less than $5,000 gross sales.
3/ Estimates of total quantities and use by various industries based on reports by industrial users to the Office of Price Administration. The total base for industrial users' quotas is somewhat higher than actual total use in 1941 because of adjustments for hardship cases.
4/ Estimates based on allotments made by the OPA.
5/ Estimated from quotas for first 3 quarters of 1945 announced by the OPA.
6/ Including bulk sweetened condensed milk and some egg mixes.
7/ Including canned fruits, jams, jellies, preserves, fruit butters.
8/ Including meat packing, salad dressings, pharmaceuticals, and small quantities for non-food users.

## Civilian Per Capita Consumption of Fat and Non-Fat Milk Solids, 1930-45 1/

Civilian consumption of total milk solids, which amounted to about 69 pounds per capita during the 1930's, increased to over 78 pounds per capita in 1944 and in 1945. The increase was in consumption of the non-fat solids -- that is proteins, lactose, minerals--from 37 or 38 pounds per capita in the period 1930-36 to about 49 pounds this year (1945). Civilian consumption of fat solids--butterfat--changed comparatively little until 1943, when a drop occurred. (See Table 2.) The heavy demand for dairy products for military and other war uses, in addition to greater civilian demand, has been met by Government programs designed to encourage increased milk production and fuller utilization of milk solids for human consumption. Price relationships have favored increased use of milk in fluid form and in the form of whole milk manufactured products.

About one-fifth of the total milk solids consumed per capita during the years 1930-1940 was supplied by butter. In 1945 butter will furnish only one-tenth of the civilian supply of milk solids. (Table 3) Because of large military needs and reduced production of butter, civilian butter consumption decreased from 13.6 pounds, fat content basis, in 1940 to 8.3 pounds in 1945. Meanwhile, the fat content of fluid milk and cream consumed by civilians went up from 13.7 pounds in 1940 to about 17 pounds this year. The non-fat solids in fluid milk and cream consumed by civilians increased from 25.4 pounds per capita in 1940 to about 33 pounds per capita in 1945. Fluid milk and cream will supply about 64 percent of the total milk solids consumed by civilians this year, compared with about 54 percent of the total milk solids consumed in 1940. Sales of fluid cream have been restricted by WFO 79 for almost 2 years in most urban areas, so that most of the increase in fluid milk and cream has been in fluid milk. In addition, the butterfat content of fluid cream has been limited to 19 percent since November 1942 under WFO 13.

The importance of manufactured whole milk products and skim milk products in the total supply of milk solids has varied considerably over the past 15 years. In the 5 year period 1930-34, dairy products other than butter and fluid milk and cream supplied 22 percent of the average per capita consumption of milk solids. The proportion increased steadily to about 29 percent in 1941. Since then, heavy non-civilian requirements for manufactured dairy products have limited civilian consumption. About 25 percent of the milk solids for civilians this year will come from dairy products other than butter and fluid milk and cream.

In the period 1930-1939, a little less than 45 percent of the butterfat consumed by civilians was eaten in the form of butter, about the same percentage in the form of fluid milk and cream, and the remaining 10 to 15 percent in manufactured whole milk products. A slight shift occurred between butter and other manufactured products around 1940, with increasing importance of other manufactured whole milk products. Since 1940, the drop in butter consumption and the increase in fluid milk and cream consumption have reduced the proportion of butterfat consumed in the form of butter to 28 percent of the total, and increased the proportion consumed in the fresh fluid form to 58 percent.

1/ For the purposes of this study all dairy products have been converted into terms of solid content--fat and non-fat. A related study using whole milk equivalents calculated on the basis of fat and non-fat solids is reported in the May, 1943 issue of the Dairy Situation and brought to date in the March, 1945 issue of the same periodical.

Prospective greater consumption of milk in fluid form in 1945, compared with 1935-39, probably will contribute an additional 8 pounds per capita of proteins, lactose and minerals such as calcium and iron, as well as more butterfat. This is one of the most significant factors in the improvement in our level of nutrition in the past decade. About half of the calcium of the average 1945 civilian diet, 15 percent of the protein, and 30 percent of the riboflavin (a vitamin) comes from fluid milk and cream.

Fluid milk and cream furnish about two-thirds of the total civilian supply of non-fat milk solids, skim milk products about one-fifth, and manufactured whole milk products one-tenth. Before military requirements became so heavy (i.e. in 1940-42), manufactured whole milk products, such as cheese and condensed and evaporated milk supplied about 15 percent of the non-fat milk solids. The 1945 civilian consumption of skim milk products is expected to be about 20 percent greater than in the pre-war years 1935-39. There has been a steady increase in the civilian consumption of these products since the early 1930's, despite the large quantities of dried skim milk being shipped abroad under lend-lease and for relief feeding.

Table 2.- Civilian per capita consumption of fat and non-fat milk solids, 1930-45 1/
(Solid content in pounds)

| Item | Year | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 |
| Total milk solids | 69.6 | 69.3 | 69.4 | 68.9 | 68.3 | 68.7 | 69.4 | 70.3 | 70.4 | 72.5 |
| A. Butterfat | 31.5 | 31.8 | 31.8 | 31.5 | 31.5 | 31.0 | 30.8 | 31.0 | 31.0 | 32.2 |
| 1. Butter | 13.9 | 14.5 | 14.6 | 14.3 | 14.6 | 13.8 | 13.2 | 13.1 | 13.2 | 13.9 |
| 2. Fl. milk & cream | 14.0 | 14.0 | 14.0 | 14.0 | 13.4 | 13.4 | 13.6 | 13.7 | 13.5 | 13.8 |
| 3. Mfgd. whold milk products and other | 3.6 | 3.3 | 3.2 | 3.2 | 3.5 | 3.8 | 4.0 | 4.2 | 4.3 | 4.5 |
| B. Non-fat milk solids | 38.1 | 37.5 | 37.6 | 37.4 | 36.8 | 37.7 | 38.6 | 39.3 | 39.4 | 40.3 |
| 1. Fluid milk & cream | 26.0 | 25.8 | 26.0 | 25.9 | 24.7 | 24.9 | 25.3 | 25.4 | 25.1 | 25.5 |
| 2. Mfgd. whole milk products | 4.7 | 4.5 | 4.4 | 4.4 | 4.8 | 5.2 | 5.3 | 5.6 | 5.7 | 5.9 |
| 3. Skim milk products and other | 7.4 | 7.2 | 7.2 | 7.1 | 7.3 | 7.6 | 8.0 | 8.3 | 8.6 | 8.9 |

| Item | 1930-34 average | 1935-39 average | Year | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 2/ |
| Total milk solids | 69.1 | 70.3 | 72.9 | 73.6 | 76.6 | 76.2 | 78.7 | 78.4 | |
| A. Butterfat | 31.6 | 31.2 | 32.0 | 31.7 | 32.7 | 29.5 | 30.9 | 29.7 | |
| 1. Butter | 14.4 | 13.4 | 13.6 | 12.8 | 12.6 | 9.5 | 9.6 | 8.3 | |
| 2. Fluid milk & cream | 13.9 | 13.6 | 13.7 | 14.0 | 14.9 | 15.5 | 16.9 | 17.2 | |
| 3. Mfgd. whole milk products and other | 3.3 | 4.2 | 4.7 | 4.9 | 5.2 | 4.5 | 4.4 | 4.2 | |
| B. Non-fat milk solids | 37.5 | 39.1 | 40.9 | 41.9 | 43.9 | 46.7 | 47.8 | 48.7 | |
| 1. Fluid milk & cream | 25.7 | 25.2 | 25.4 | 26.0 | 27.6 | 30.9 | 32.6 | 33.2 | |
| 2. Mfgd. whole milk products | 4.6 | 5.5 | 6.3 | 6.3 | 6.6 | 6.2 | 5.7 | 5.4 | |
| 3. Skim milk products and other | 7.2 | 8.4 | 9.2 | 9.6 | 9.7 | 9.6 | 9.5 | 10.1 | |

1/ Includes consumption of butter; fluid milk and cream; evaporated and condensed whole, skim and buttermilk (case and bulk); whole and skim milk cheese; dried whole and skim milk and buttermilk for human consumption; malted milk, dried whey, skim milk, and buttermilk consumed directly and used in other drinks, ice cream, and a few minor items. Most of the factors used for conversion from product to solid content were those given in U. S. D. A. Circular 549, June 1940 "Proximate Composition of American Food Materials", by C. Chatfield and G. Adams. A few adjustments were made on the basis of late industry information.

2/ Preliminary indications.

Table 3.- Sources of fat and non-fat milk solids consumed by civilians, per capita, as percentages of the total, 1/ 1930-45

| Item | 1930-34 average | 1935-39 average | Year 1940 | 1941 | 1942 | 1943 | 1944 | 1945 |
|---|---|---|---|---|---|---|---|---|
| | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. | Pct. |
| A. Total milk solids | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 1. Butter | 20.8 | 19.1 | 18.7 | 17.3 | 16.4 | 12.5 | 12.2 | 10.6 |
| 2. Fluid milk & cream | 57.3 | 55.2 | 53.6 | 54.1 | 55.5 | 60.9 | 62.9 | 64.3 |
| 3. Other | 21.9 | 25.7 | 27.7 | 28.6 | 28.1 | 26.6 | 24.9 | 25.1 |
| B. Butterfat | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 1. Butter | 45.6 | 42.9 | 42.5 | 40.4 | 38.5 | 32.2 | 31.1 | 27.9 |
| 2. Fluid milk & cream | 44.0 | 43.6 | 42.8 | 44.2 | 45.6 | 52.5 | 54.7 | 57.9 |
| 3. Mfgd. whole milk products and other | 10.4 | 13.5 | 14.7 | 15.4 | 15.9 | 15.3 | 14.2 | 14.2 |
| C. Non-fat milk solids | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 1. Fluid milk & cream | 68.5 | 64.4 | 62.1 | 62.1 | 62.9 | 66.2 | 68.2 | 68.2 |
| 2. Mfgd. whole milk products | 12.3 | 14.1 | 15.4 | 15.0 | 15.9 | 13.3 | 11.9 | 11.1 |
| 3. Skim milk products and other | 19.2 | 21.5 | 22.5 | 22.9 | 22.1 | 20.5 | 19.9 | 20.7 |

1/ Derived from Table 2.
2/ Preliminary indications.

Review of Shipments of Agricultural Commodities to Soviet Russia, December 1, 1941 to May 31, 1945

The United States has shipped about 8-1/2 billion pounds of agricultural commodities mostly food, to Soviet Russia under lend-lease since we entered the war in December 1941. (Table 4). Over the 3 1/2 year period about 2.2 billion pounds or 26 percent of the shipments by weight were grains and cereal products, 18 percent canned meat, 16 percent sugar, 15 percent animal fats and cured meats, 12 percent vegetable oils. Practically all of the foods shipped was used for the Red Army or for clinical treatments, according to reports from Russian sources. The shipments have been made under 4 protocols or agreements between the 2 countries. The first protocol covered the period from December 1941 to June 30, 1942, during which time about 617 million pounds were shipped. Under the second protocol, 1,944 million pounds were shipped in the fiscal year, 1942-43. Deliveries under the third protocol, 1943-44, amounted to 3,517 million pounds. During the first 11 months of the current fiscal year, 1944-45, shipments have been considerably reduced to 2,461 million pounds. Of this total, about 1,119 million pounds have been shipped since January 1, 1945. The food situation in Russia in 1944-45 was somewhat improved over the previous 2 years of very tight food supplies. Further improvement is expected following the 1945 harvest.

In tonnage terms, the most important commodities shipped have been cereals, meats, sugar, and fats and oils, in the order given. Under the first 3 protocols, larger quantities of cereals were shipped than any other group of commodities. In the past year, meats and fats and oils have been most important. The reduction in cereal shipments apparently reflects the reoccupation of heavy grain producing areas in 1943 and 1944.

Table 5 shows 1944 comparable data of shipments of major foods to Soviet Russia, total non-civilian takings of the same items from United States supplies (military purchases, War Food shipments mostly lend-lease and including Russian shipments, and commercial exports and shipments), and United States civilian consumption. In order to put the quantities of various foods shipped to Soviet Russia in the perspective of United States food supplies, the major foods included in Table 4 have been converted into comparable terms where necessary, and calendar year data have been used. About two-thirds of the non-civilian takings of vegetable oils in 1944 went to meet Russian war needs. We shipped 493 million pounds of vegetable oils to the Soviet Union and United States civilians consumed 2,449 million pounds. Vegetable oils included margarine, shortening, and cooking and salad oils. Of these, only margarine was rationed in this country during most of 1944. Soviet Russia received about one-sixth of the 5.9 billion pounds, dressed weight, of non-civilian takings of meat last year, most of it cheaper cuts of pork, while United States civilians ate 19.3 billion pounds, 150 pounds per capita. Another significant item in the Russian shipments last year was sugar. The United States sent 654 million pounds of sugar to Soviet Russia; almost 2 billion pounds went to other war uses, and civilian consumers used 11.5 billion more (89 pounds per capita compared with the 96.5 pound average, 1935-39.)

Last year supplies of eggs and lard were considered by many people to be of surplus proportions. Both were purchased by the War Food Administration under its commitments to support prices of eggs and hogs. About 291 million pounds of lard and 419 million pounds of eggs, (shell egg equivalent of dried eggs) were sent to the Soviet Union, to meet shortages of fats and proteins. In 1944, 80 million pounds of butter were shipped to Soviet Russia, about 20 percent of the total war takings from United States supplies. Those 80 million pounds, about one-half pound per United States civilian, went for clinical and top priority military use, according to information given the War Food Administration. The total quantity of butter, including that blended in Carters' spread and butter oil, shipped to Soviet Russia from December 1941 to May 31, 1945 amounted to 185 million pounds.

Table 4.- Total shipments of agricultural commodities to Soviet Russia, December 1941-May 31, 1945 1/ (million pounds)

| Commodity | 1st protocol deliveries Dec. 12, 1941-June 30, 1942 | 2nd protocol deliveries July 1, 1942-June 30, 1943 | 3rd protocol deliveries July 1, 1943-June 30, 1944 | 4th Protocol deliveries July 1, 1944-May 31, 1945 | 4th Protocol deliveries Jan. 1, 1945-May 31, 1945 | Total deliveries Dec. 1941 to May 31, 1945 |
|---|---|---|---|---|---|---|
| Total | 617.4 | 1,943.9 | 3,517.2 | 2,461.4 | 1,119.0 | 8,539.9 |
| Wheat, flour, cereals, etc. | 215.4 | 690.9 | 975.5 | 336.8 | 203.9 | 2,218.6 |
| Sugar, refined | 170.2 | 228.3 | 591.6 | 381.2 | 234.4 | 1,371.3 |
| Canned meat | 87.3 | 377.8 | 543.0 | 539.0 | 225.9 | 1,547.1 |
| Butter | 3.3 | 15.8 | 81.0 | 43.0 | 5.9 | 143.1 |
| Carters' spread 2/ | --- | --- | 18.0 | 30.9 | 3.9 | 48.9 |
| Animal fats, cured meats | 82.6 | 260.9 | 467.2 | 466.9 | 193.7 | 1,277.6 |
| Vegetable oils | 37.2 | 207.3 | 439.7 | 323.4 | 62.3 | 1,007.6 |
| Dried milk | --- | 32.4 | 66.0 | 42.3 | 24.1 | 140.7 |
| Cheese | --- | 8.9 | 31.6 | 22.6 | 7.9 | 63.1 |
| Canned milk | --- | 11.6 | 14.2 | 34.7 | 16.9 | 60.5 |
| Dried eggs | 17.9 | 44.6 | 77.7 | 88.4 | 45.4 | 228.6 |
| Dehydrated & concentrated soups and cereals including soya | --- | 3.5 | 34.2 | 23.0 | 16.6 | 60.7 |
| Concentrated juices | --- | 1.4 | 2.7 | .1 | --- | 4.2 |
| Vegetable pulps, paste & purees | --- | .4 | 6.5 | 8.5 | 2.0 | 15.4 |
| Soya flour & grits | --- | 5.7 | 109.2 | 23.3 | 16.0 | 137.8 |
| Other agricultural commodities | 3.5 | 54.4 | 59.1 | 97.3 | 60.1 | 214.3 |

1/ Practically all of these foods was for use of the Red Army or for clinical purposes. Data from War Food Administration, Commodity Credit Corporation. Data for 1945 preliminary.
2/ Contains 85 percent butter, 11 percent vegetable oils.

Table 5.- Shipments of major food commodities to Soviet Russia in 1944 compared with total non-civilian takings and U. S. civilian consumption

| Commodity | Shipments to Soviet Russia 1944 1/ | Military takings, War Food shipments, com'l exports and shipments, 1944 | | U. S. civilian Consumption 1944 | |
|---|---|---|---|---|---|
| | | Total | Percentage shipped to Soviet Russia | Total | Per capita |
| | Mil. lbs. | Mil. lbs. | Percent | Mil. lbs. | Lbs. |
| Total cereals, grain equivalent | 726 | 9,638 | 7.5 | 49,434 | 346 |
| Sugar, refined | 654 | 2,628 | 24.9 | 11,508 | 89.0 |
| Total meat, dressed weight equivalent | 990 | 5,911 | 16.7 | 19,338 | 149.5 |
| Total butter | 80 | 405 | 19.8 | 1,533 | 11.9 |
| Lard | 291 | 1,021 | 28.5 | 1,795 | 13.9 |
| Vegetable oils 2/ | 493 | 726 | 67.9 | 2,449 | 18.9 |
| Cheese 3/ | 30 | 499 | 6.0 | 643 | 5.0 |
| Canned milk 4/ | 20 | 2,519 | .8 | 2,092 | 16.2 |
| Dried milk, whole and skim | 34 | 435 | 7.8 | 248 | 1.9 |
| Eggs, shell egg equivalent | 420 | 1,791 | 23.4 | 5,676 | 43.9 |

1/ Based on data from War Food Administration, Commodity Credit Corporation.
2/ Includes margarine, shortening, and other edible oils. Russian shipments include linseed oils used for edible purposes.
3/ Excludes skim milk cheeses.
4/ Evaporated and condensed.

E73
3

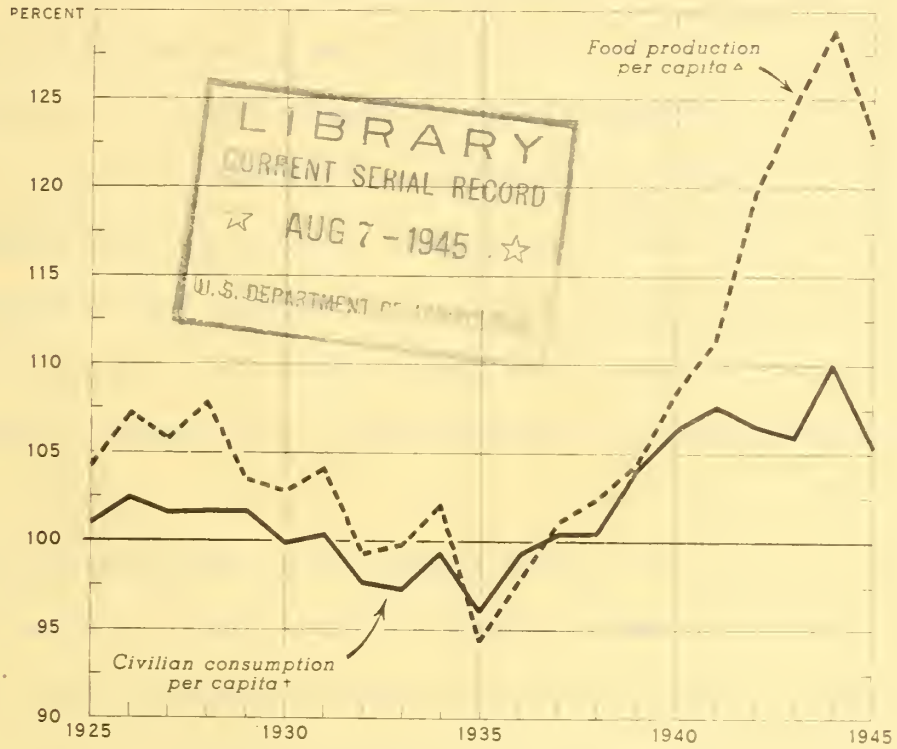
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 27 BAE JULY 1945

## FOOD PRODUCTION AND CIVILIAN FOOD CONSUMPTION ON A PER CAPITA BASIS, 1925-45 *

INDEX NUMBERS (1935-39=100)




* DATA FOR 1945 ARE PRELIMINARY

△ PRODUCTION OF PRINCIPAL AGRICULTURAL FOOD COMMODITIES FOR SALE AND FOR FARM HOME CONSUMPTION DIVIDED BY THE TOTAL POPULATION

† AVERAGE CONSUMPTION FOR TOTAL POPULATION, 1925-40; AVERAGE CONSUMPTION FOR CIVILIAN POPULATION ONLY, 1941-45

U. S. DEPARTMENT OF AGRICULTURE NEG 45402 BUREAU OF AGRICULTURAL ECONOMICS

Over-all food consumption has remained relatively stable over the past 20 years. The lowest consumption per capita was in the depression year 1935, while the highest level was in the war year 1944, 10 percent above the 1935-39 average. A 5 percent drop in civilian consumption from the 1944 rate is indicated for 1945, reflecting a reduction in total food output and increased military takings.

The high level of civilian consumption during the war has been made possible by the great increase in food production despite the use of about 1/5 of the total food supply for war uses, both military and export. The total volume of production of principal foods for sale and farm home consumption in 1944 was 38 percent above the 1935-39 average, 29 percent above when adjusted for the increase in total population. According to July indications, total food production in 1945 will be about 33 percent above the pre-war average, but 4 percent below 1944.

# THE NATIONAL FOOD SITUATION

## SUMMARY

No significant relief from shortages of civilian food supplies is in prospect for the next 12 months. Such foods as meats, fats and oils, sugar, cheese, condensed and evaporated milk, poultry, eggs, and canned fruit and canned vegetables will continue short in relation to current high demands. In addition, rice, dry beans, apples, and processed foods using large amounts of sugar and fats and oils may become short. On the other hand, civilian supplies of fluid milk, skim milk products, canned fruit juices, many fresh vegetables and fruits including citrus fruits, fresh fish, and most grain products will be fairly plentiful and will help keep the general level of nutrition above the pre-war level.

The basic food problem of the United States in 1945 is to distribute an over-all food output one-third greater than in 1935-39 to meet an over-all civilian, military, and export demand approximately one-half greater than the pre-war demand.

Total food production in 1945 may be 3 to 4 percent below 1944, but 33 percent above the average 1935-39. Total production of food from livestock in the calendar year 1945 may be about 5 percent less than last year, although 34 percent above pre-war. Most of the reduction from 1944 in livestock products is concentrated in the first 3 quarters of the year. The current outlook is for not much improvement in the first half of 1946 over the 1945 level. On the basis of July 1 conditions, the production of food crops for sale and farm home consumption in 1945 will be nearly the same as in 1944 and about 29 percent above the pre-war (1935-39) average.

Crop conditions reported as of July 1 indicate good pastures, a good supply of hay and a large crop of oats, but the smallest corn crop to be harvested in recent years. An increase in the stock of old corn on hand July 1, as compared with the low level of a year ago, offsets to some extent the indicated reduction in the crop. The final yield of the corn crop still depends on weather in July and August, and because of late plantings this year, an early frost would cause greater damage than usual. The corn crop, together with carryover of old corn, may prove adequate, with other grains and concentrates including wheat for feed, to maintain about the present level of livestock production, but with no significant quantities of corn to spare for the production of alcohol or for export.

Current pasture conditions and the indicated large supply of hay are favorable for maintaining a high level of milk and beef production. Chicken numbers on farms on July 1 were somewhat above numbers a year ago and prospects are that chicken and egg production will also be maintained at a high level. Hogs numbers were reduced during 1944, and pork production for the first 3 quarters of 1945 has been far below last year's levels. Output of pork will be moderately smaller this fall than last. Some improvement in pork supplies may occur in the late spring and summer of 1946, when 1945 fall pigs reach market weights. More pigs will be raised this fall than last, but market weights of hogs next year will be materially lighter than the record weights this year, reflecting smaller supplies of feed grains.

The Department of Agriculture is continuously reviewing the food needs of civilians, of the armed forces, and of liberated areas. It now looks as if the food supply of the United States in 1945 will be distributed about as follows: 77 percent to U. S. civilians, 17 percent to the armed forces, including relief feeding by the military, 4 or 5 percent purchased by the Department of Agric-

ulture for shipment abroad under lend-lease and for civilian relief and 1 or 2 percent for commercial exports and shipments. In 1944, about 13 percent of the food went to our armed forces, 7 percent was exported, and civilians consumed 80 percent.

Prospective food supplies for civilians in 1945 indicate that consumption per person will average about 5 percent higher in 1935-39, but 5 percent below the 1944 record rate. The distribution of the total civilian supplies is quite different from that of the pre-war period. In those years many people were financially unable to buy as much of some foods as they wanted. Now, consumer incomes are much higher and civilian supplies are limited by takings to meet war needs. Available civilian supplies tend to stay close to the areas where produced as long as there is unfilled demand in those areas. Therefore, supplies for many urban areas are reduced disproportionately. Furthermore, transportation difficulties may make it impossible to move to consumers all of our fresh fruit and vegetable supplies. This may result in increased processing and perhaps some spoilage.

Marked differences in the supplies of various foods in relation to consumer demand for them will continue. Over-all meat supplies for civilians may be a little larger this winter than in recent months, but most of the seasonal increase in meat production will be taken to meet the needs of our armed forces. The Department of Agriculture is tentatively scheduled to buy about 4 percent of the October-December production of meat for use in liberated areas. No material improvement in total civilian meat supplies can come until this fall's pig crop is marketed next spring. The tight supply situation in fats and oils has developed chiefly because of reduced lard output resulting from the decrease in hog slaughter, and will not improve until hog slaughter is stepped up next spring. Purchases of edible fats and oils to meet non-civilian needs are expected to be smaller in 1945 than in 1944.

Both total and civilian supplies of sugar and eggs will be smaller in the next six months than they were in the first half of the year. Prospects are good for increased civilian egg supplies in 1946. The sugar situation will be tight for some time because of short world sugar supplies and because United States consumption in 1944 and the early part of 1945 was out of proportion to the reduced over-all supplies available to the United States. The large quantities of canned fish, rice, canned fruits and canned vegetables which our armed forces need for the Pacific War will reduce the supplies of those foods for civilians this fall and winter compared with last year. The apple crop will be short this fall.

-- July 14, 1945

## COMMODITY REVIEWS

### Meats

Civilian meat supplies during the last half of 1945 will be about 25 percent less than demand at ceiling prices and 10 to 15 percent less than in July-December, 1944. But they will be slightly larger than in the first half of 1945, because of some increase in the last quarter of the year. Relatively large purchases of meat by the armed forces and by the Department of Agriculture for lend-lease and liberated areas are planned for the fiscal year 1945-46. These purchases probably will take up much of the seasonal increase in production this fall and winter. See Table 4. Looking farther ahead, meat supplies for civilians in the first half of 1946 may be 5 to 10 percent greater than in the first half of 1945 but will be less than the large supply (about 154 pounds per capita, annual rate) available to civilians in the first half of 1944.

United States meat production in 1945 is now indicated at 22.7 billion pounds (wholesale dressed-weight basis), 8 percent less than the all-time high of 1944, but 40 percent greater than the average for 1935-39.

Total meat production during the first half of 1945 fell about 13 percent below a year earlier. Production is expected to continue somewhat under that of a year earlier through the summer, but during the fall and winter it is likely to be about the same as a year earlier. With a 13 percent increase in the 1945 fall pig crop indicated in early June and with continued large cattle slaughter, meat production in the late spring and summer of 1946 may be slightly larger than a year earlier. Hog slaughter beginning next April will be greater than in the late spring and summer of 1945, but market weights of hogs will be lighter--reflecting smaller supplies of feed grains.

Table 1.- Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1942, 1943, 1944, and forecasts for 1945 with percentage comparisons,

(Index numbers, 1935-39 = 100)

| Item | 1942 | 1943 Revised | 1944 | 1945 preliminary | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|
| Food grains 2/ | 139 | 116 | 148 | 155 | 105 |
| Truck crops 3/ | 129 | 124 | 135 | 137 | 101 |
| Fruits and nuts 4/ | 117 | 107 | 123 | 115 | 93 |
| Vegetables, excluding truck crops 5/ | 104 | 125 | 106 | 106 | 100 |
| Sugar crops 6/ | 110 | 81 | 82 | 92 | 112 |
| Total food crops 7/ | 124 | 116 | 129 | 129 | 100 |
| Meat animals 8/ | 132 | 150 | 155 | 141 | 91 |
| Poultry 9/ | 131 | 152 | 153 | 146 | 95 |
| Dairy products 10/ | 114 | 113 | 116 | 118 | 102 |
| Total food livestock | 126 | 138 | 141 | 134 | 95 |
| Total food production | 125 | 132 | 138 | 133 | 96 |
| Total agricultural production | 124 | 128 | 136 | 128 | 94 |
| Civilian per capita food consumption | 107 | 106 | 110 | 105 | 95 |

1/ Production indexes are based on the July crop report and estimated marketings and home consumption of livestock and livestock products for the calendar year 1945.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for manufacture (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943, 1944, 1945, with percentage comparisons 1/

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 Prel. | 1945 as a percentage 1935-39 | 1945 as a percentage 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Percent | Percent |
| Meats (dressed weight) | | | | | | | |
| Beef | 54.8 | 61.2 | 49.6 | 55.1 | 51-54 | 93-99 | 93-98 |
| Veal | 8.0 | 8.0 | 7.9 | 11.2 | 11 | 138 | 98 |
| Lamb and mutton | 6.7 | 7.2 | 6.4 | 6.6 | 7 | 104 | 106 |
| Pork (excluding lard) | 56.1 | 61.5 | 72.4 | 76.7 | 51-53 | 91-94 | 66-69 |
| Total meats | 125.6 | 137.9 | 136.3 | 149.6 | 120-125 | 96-100 | 80-84 |
| Poultry products | | | | | | | |
| Eggs 2/ | 37.3 | 38.9 | 43.1 | 43.9 | 46.5 | 125 | 106 |
| Chicken (dressed weight) | 17.9 | 21.5 | 28.0 | 23.6 | 21.5 | 120 | 91 |
| Turkey (dressed weight) | 2.6 | 3.7 | 3.4 | 3.3 | 3.8 | 146 | 115 |
| Dairy products | | | | | | | |
| Total milk(milk equivalent) | 801 | 839 | 764 | 788 | 779 | 97 | 99 |
| Cheese | 5.5 | 6.3 | 5.0 | 5.0 | 5.3 | 96 | 106 |
| Cond. and evap. milk | 16.7 | 18.3 | 18.6 | 16.2 | 19.0 | 114 | 117 |
| Fluid milk and cream | 340 | 372 | 403 | 423 | 432 | 127 | 102 |
| Fats and oils | | | | | | | |
| Butter, farm and factory (actual weight) | 16.7 | 15.6 | 11.8 | 11.9 | 10.6 | 63 | 89 |
| Lard | 11.0 | 13.6 | 14.6 | 13.9 | 11.6 | 105 | 83 |
| Margarine (fat content) | 2.3 | 2.2 | 3.1 | 3.1 | 3.3 | 143 | 106 |
| Shortening (fat content) | 11.7 | 8.9 | 9.8 | 9.2 | | | |
| Other edible fats and oils (fat content) | 6.3 | 7.6 | 6.4 | 6.6 | 15.1 | 84 | 96 |
| Total fats and oils 3/ | 48.0 | 47.9 | 45.5 | 44.7 | 40.5 | 84 | 91 |
| Total, all fat content | 44.7 | 44.9 | 43.4 | 42.4 | 38.5 | 86 | 91 |
| Fruits | | | | | | | |
| Fresh | | | | | | | |
| Citrus | 48.8 | 57.0 | 59.6 | 68.0 | 65.9 | 135 | 97 |
| Apples (commercial) | 30.2 | 26.7 | 25.1 | 26.5 | 23.3 | 77 | 88 |
| Other (excluding melons) | 59.2 | 46.1 | 36.2 | 50.3 | 54.8 | 93 | 109 |
| Total fresh | 138.2 | 129.8 | 120.9 | 144.8 | 144.0 | 104 | 99 |
| Processed | | | | | | | |
| Canned fruit | 14.9 | 16.3 | 12.2 | 9.6 | 9.4 | 63 | 98 |
| Canned juices | 4.1 | 6.8 | 6.6 | 10.1 | 10.3 | 251 | 102 |
| Frozen | 4/ .7 | 1.6 | 1.3 | 1.9 | 2.2 | 314 | 116 |
| Dried | 5.6 | 4.5 | 5.9 | 5.6 | 5.3 | 95 | 95 |

Continued -

Table 2.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943, 1944, 1945, with percentage comparisons 1/-continued

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 prel. | 1945 as a percentage 1935-39 | 1945 as a percentage 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Percent | Percent |
| Vegetables | | | | | | | |
| Fresh | 235 | 251 | 236 | 254 | 257 | 109 | 101 |
| Canned | 31.1 | 38.7 | 33.7 | 33.9 | 29-31 | 93-100 | 86-91 |
| Frozen | .4 | 1.0 | .7 | 1.6 | 1.5 | 375 | 94 |
| Potatoes | 130 | 118 | 133 | 122 | 124 | 95 | 102 |
| Sweet Potatoes | 23.3 | 19.6 | 21.6 | 21.4 | 18.6 | 80 | 87 |
| Beans, dry edible | 8.8 | 8.7 | 8.4 | 8.4 | 7.2 | 82 | 86 |
| Canned soups & baby foods | 5.2 | 8.5 | 6.9 | 8.8 | 9.4 | 181 | 107 |
| Sugar (refined) | 96.5 | 86.2 | 80.3 | 89.0 | 72 | 75 | 81 |
| Grains | | | | | | | |
| Corn products: | | | | | | | |
| Corn meal | 23.9 | 21.8 | 22.6 | 22.6 | 22.6 | 95 | 100 |
| Corn sirup | 7.7 | 14.3 | 12.5 | 13.4 | 13.8 | 179 | 103 |
| Corn starch | 1.3 | 1.7 | 1.8 | 1.4 | 1.4 | 108 | 100 |
| Corn sugar | 3.2 | 5.5 | 5.0 | 4.6 | 5.0 | 156 | 109 |
| Breakfast food | 1.7 | 2.5 | 2.6 | 2.5 | 2.6 | 153 | 104 |
| Hominy | 1.2 | 1.8 | 1.8 | 1.8 | 1.7 | 142 | 94 |
| Oats | | | | | | | |
| Oatmeal | 3.9 | 4.8 | 4.0 | 3.2 | 4.1 | 105 | 128 |
| Barley | | | | | | | |
| Barley food products 5/ | 1.2 | 1.4 | 1.5 | 1.5 | 1.5 | 125 | 100 |
| Wheat | | | | | | | |
| Flour 6/ | 153.1 | 155.7 | 161.3 | 161.0 | 163.0 | 106 | 101 |
| Breakfast food | 3.7 | 3.8 | 3.7 | 3.7 | 3.8 | 103 | 103 |
| Rye | | | | | | | |
| Rye flour | 2.2 | 2.7 | 3.3 | 2.8 | 2.5 | 114 | 89 |
| Rice milled | 5.7 | 5.9 | 6.3 | 6.7 | 5.7 | 100 | 85 |
| Beverages | | | | | | | |
| Coffee 7/ | 14.0 | 13.4 | 13.0 | 15.8 | 16.7 | 119 | 106 |
| Tea | .67 | .53 | .46 | .53 | .66 | 99 | 125 |
| Cocoa | 4.4 | 3.8 | 2.9 | 3.6 | 3.6 | 82 | 100 |
| Peanuts (shelled) | 4.7 | 6.9 | 6.3 | 6.2 | 6.2 | 132 | 100 |

Population estimates used to obtain per capita consumption figures are official census estimates of total population adjusted for under-enumeration of children under 5 and for military personnel rating out of civilian supplies. 1/ Data for 1945 are preliminary. Calendar year basis except for canned fruits, canned vegetables, and dried fruits which are on a pack year basis; potatoes and sweet-potatoes which are on the basis of a year beginning July 1; fresh citrus fruits, peanuts and dry edible beans on a crop-year basis, rice on an August 1 year. All years begin in the year designated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. For more detailed explanation see footnotes Table 6. 2/ In terms of number of eggs the apparent per capita consumption was 298 in 1935-39, 311 in 1942, 345 in 1943, 351 in 1944, and 372 in 1945. 3/ Includes actual weight of butter, fat content of other items. 4/ Average 1937-39. Data prior to 1937 are not available. 5/ All barley food products in terms of malt equivalent. 6/ Includes white, whole wheat, and Semolina flour. 7/ Green bean basis.

Table 3.- Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1945 1/

| Year | Source of total food | | | | | Distribution by claimants | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Total food disappearance | Food Production | Imports | Reduction in stocks | Increase in stocks | Civilian | Military including military relief feeding | Department of Agriculture Net purchases | Department of Agriculture Shipments | Department of Agriculture Reduction in stocks | Department of Agriculture Increase in stocks | Exports and Shipments 3/ |
| | Percentage of food disappearance in each year | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.5 | 6.0 | | .5 | 93.7 | 2.1 | 2.5 | 2.3 | | .2 | 1.7 |
| 1942 | 100.0 | 94.1 | 3.8 | 2.1 | | 86.3 | 6.5 | 6.2 | 5.2 | | 1.0 | 1.0 |
| 1943 | 100.0 | 95.6 | 4.7 | | .3 | 79.8 | 10.8 | 8.3 | 7.2 | | 1.1 | 1.1 |
| 1944 | 100.0 | 94.5 | 4.8 | .7 | | 80.3 | 12.7 | 5.8 | 6.5 | .7 | | 1.2 |
| 1945 (forecast) | 100.0 | 95.1 | 4.5 | .4 | | 77.5 | 16.6 | 4.4 | 5.5 | 1.1 | | 1.5 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.6 |
| 1941 | 114.1 | 107.8 | 6.9 | | .6 | 106.9 | 2.4 | 2.8 | 2.6 | | .2 | 2.0 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.4 | 8.1 | 7.8 | 6.5 | | 1.3 | 1.3 |
| 1943 | 129.4 | 123.7 | 6.1 | | .4 | 103.2 | 14.0 | 10.8 | 9.3 | | 1.5 | 1.4 |
| 1944 | 136.8 | 129.3 | 6.6 | .9 | | 109.9 | 17.4 | 7.9 | 8.8 | .9 | | 1.6 |
| 1945 (forecast) | 131.1 | 124.6 | 6.0 | .5 | | 101.6 | 21.8 | 5.7 | 7.2 | 1.5 | | 2.0 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year.

2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipment out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture.

On the basis of July 1 crop indications and the prospective carryover of feed grains, the total supply of corn, oats, barley, and grain sorghums will be about 5 percent less in 1945-1946 than in 1944-1945. By drawing on reserve supplies (carryover), utilization of feed grains for all purposes could be as large in 1945-46 as in 1944-45. However, it will be difficult to obtain much increase in total production from grain consuming livestock in the first nine months of 1946, unless the corn crop turns out materially better than early summer indication. Pasture condition has been unusually good in recent months, and the indicated total hay supply of 113 million tons is 5 percent larger than last season. An increased output of products from hay-consuming livestock - beef cattle and dairy cattle - is possible, particularly if supplemental grain (including wheat) can be made available to the heavy milkproducing areas in the Northeast.

During the last half of this year, beef production is indicated to be moderately larger than a year earlier. With good to excellent pasture conditions over most of the country and near record numbers of cattle on farms and ranches, a large supply of grass-fat cattle should be available for slaughter this fall. The number of cattle shipped to Corn Belt States in April-June for feeding was 31 percent greater than a year earlier, indicating larger marketings of fed cattle this summer and fall than a year earlier.

Pork production during the last 6 months of the year is likely to be about 9 percent smaller than in the same period of 1944. The number of hogs on farms over 6 months, June 1, constituting most of the supply for slaughter during June-September, was estimated to be 26 percent less than a year earlier. Hog slaughter during the fall and winter probably will be smaller also, reflecting the 7 percent reduction in the 1945 spring pig crop from that of the spring of 1944.

With a smaller lamb crop produced this year than last, lamb and mutton production during the second half of 1945 may be 5 to 10 percent less than in the second half of 1944.

Meat stocks are at a low level. June 1 stocks of meat and edible offals in commercial cold-storage warehouses and meat-packing plants (including military and Department of Agriculture holdings in such storage space) totaled 603 million pounds (actual weight), the lowest for that date since 1939.

With current income levels, present ceiling prices for meat, and short supplies of poultry and other foods, civilians in the United States probably would be willing to purchase around 170 pounds of meat per person (wholesale weight) on an annual basis -- amounting to 22 billion pounds for a year, which is more than 95 percent of the indicated production in 1945. The meat supply for civilians for the year is indicated at an average per capita rate of 120-125 pounds, wholesale dressed weight.

Noncivilian meat purchases and commercial exports in 1945 probably will total around 6.5 billion pounds (dressed weight basis) compared with 5.6 billion pounds in 1944. Of the noncivilian total this year, purchases by the armed forces probably will account for around 5 billion pounds, compared with 4 billion a year earlier.

Table 4.- Production and distribution of United States meat supplies, average 1935-39, 1944, and indicated 1945 (dressed meat basis)

| Item | Average 1935-39 1/ | 1944 2/ | | | 1945 3/ | | | 1945 as a percentage of 1944 | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Jan-June | July-Dec | Year | Jan-June | July-Dec | Year | Jan-June | July-Dec | Year |
| | Mil.lb. | Mil.lb. | Mil. lb. | Mil. lb. | Mil.lb. | Mil.lb. | Mil. lb. | Pct. | Pct. | Pct. |
| Production: | | | | | | | | | | |
| Beef | 6,936 | 4,319 | 4,818 | 9,137 | 4,770 | 5,150 | 9,920 | 110 | 107 | 109 |
| Veal | 1,038 | 611 | 984 | 1,595 | 640 | 920 | 1,560 | 105 | 93 | 98 |
| Pork, excluding lard | 7,337 | 7,175 | 5,718 | 12,893 | 4,960 | 5,230 | 10,190 | 69 | 91 | 79 |
| Lamb and mutton | 871 | 469 | 554 | 1,023 | 530 | 500 | 1,030 | 113 | 90 | 101 |
| Total production | 16,182 | 12,574 | 12,074 | 24,648 | 10,900 | 11,800 | 22,700 | 87 | 98 | 92 |
| Imports: | 262 | 5 | 5 | 10 | 8 | 8 | 16 | -- | -- | -- |
| Total new supply | 16,444 | 12,579 | 12,079 | 24,658 | 10,908 | 11,808 | 22,716 | 87 | 98 | 92 |
| Non-civilian procurement 4/ | 197 | 2,842 | 2,752 | 5,594 | 3,475 | 5/3,000-3600 | 5/6,475-7075 | 122 | 109-131 | 116-126 |
| Change in commercial stocks | -56 | +81 | -362 | -281 | +20 | -20 | --- | -- | -- | -- |
| Change in farm stocks | --- | -250 | +250 | --- | +250 | +250 | --- | -- | -- | -- |
| Civilian consumption | 16,303 | 9,906 | 9,439 | 19,345 | 7,663 | 5/8,000-8,600 | 5/15,700-16,300 | 77 | 85-91 | 81-84 |
| Per capita civilian consumption (pounds) | 126 | 77 | 73 | 150 | 59 | 61-66 | 120-125 | 77 | 84-90 | 80-83 |

1/ Includes estimated beef and veal production under the drought purchase programs.
2/ Preliminary.
3/ January-June tentative estimates, July-December forecast.
4/ Includes commercial exports and shipments, and military and Department of Agriculture procurement after 1939.
5/ Estimate in round numbers.

The Secretary of Agriculture has been authorized by law to certify that meat from nonfederally inspected plants meeting sanitary standards may be shipped in interstate commerce. Heretofore, only federally inspected meats could move over state lines. Plants certified under this new authority will be required to set-aside part of their production for Government procurement. By increasing the number of plants supplying meat for civilians in deficit-producing States, better distribution of civilian meat supplies among States probably will be effected. Last year about 73 percent of the total meat produced was from plants operating under federal inspection, 19 percent was from noninspected wholesale and retail establishments, and 8 percent was farm butchered. Because non-civilian takings were from federally inspected plants only, 65 percent of the civilian supply came from federally inspected slaughter. 24 percent was non-federally-inspected wholesale and retail plant production, and 11 percent was farm slaughtered.

Table 5.- Estimated production of meat by type of slaughterer and source of civilian meat supplies, 1944.

| Type of slaughterer | Approximate number of slaughterers | Meat Production as a percentage of total | Source of civilian meat supplies as a percentage of total |
|---|---|---|---|
| | Number | Percent | Percent |
| Federally inspected | 1/ 477 | 73 | 65 |
| Non-federally-inspected: | | | |
| wholesale and retail | 2/ 26,665 | 19 | 24 |
| Producing over 2 million pounds of meat a year | 2/ 365 | 8 | 10 |
| Producing 300,000 to 2 million pounds of meat a year | 2/ 4,300 | 7 | 9 |
| Producing less than 300,000 pounds of meat a year | 2/ 22,000 | 4 | 5 |
| Farm slaughterers | 3/ 4,184,000 | 8 | 11 |

1/ Excludes non-slaughtering establishments, January 1,1945.
2/ Approximate number holding slaughter permits issued by the Department of Agriculture as of January, 1945.
3/ 16th Census of Agriculture for calendar year 1939.

## Fish

The shorter supplies of meat and high consumer purchasing power have caused the civilian demand for fish to exceed supplies. Civilian supplies of fresh and frozen fish are about as large as in the pre-war years, but supplies of canned fish for civilian consumption are only about 30 percent as large because of heavy non-civilian needs.

The total U.S. supply of fish has actually declined during the war. In the emergency of December 1941, many of the larger and more modern boats were commandeered by the armed services. Some of the best fishing grounds were in war areas. The industry suffered considerable loss of manpower, both for ships and for on-shore plants. Materials and facilities were limited by war restrictions. The freezing of fish was limited by transportation delays, shortages of refrigeration equipment, refrigerated cars, storage space and ice during months of heavy production. The prospects for total supplies in 1945-46 are much better than in the past three or four years, but much the same as in the pre-war period. About 15 percent more boats (including more efficient ones) are available than last year; shortages of manpower, material and facilities have eased somewhat; and important fishing areas are now free of enemy action.

Domestic landings of fish for the fresh and frozen markets may be about 810 million pounds (dressed weight) in 1945-46, 10 percent more than in 1944-45. About 40 percent of the total supply of fresh and frozen fish comes from New England landings. During the first 6 months of 1945 landings in this area were 16 percent greater than in the same period of 1944. Net increases have also been made in landings from some of the other ports.

The importation of fresh and frozen fish in 1945 may also be increased. Imports of fresh and frozen fish last year are estimated at about 130 million pounds in dressed weight equivalents. About 95 percent of these were from Canada and the remainder from Iceland, Newfoundland, and Greenland. Imports in 1945 may increase as much as 10 million pounds over those of 1944.

The procurement of fresh and frozen fish, mostly frozen fish, for the armed forces has amounted to about 10 percent of the total supply. Most of civilian consumption this year of 6 pounds or so per capita (dressed weight) will be in the form of fresh fish. Cold storage holdings on June 1 were down 42 percent from June 1,1944. Current demand has been so strong that much smaller quantities have been frozen. Smaller supplies of frozen fish will tend to reduce the consumption of fish in the inland areas. Most of the fresh fish is eaten in the coastal and Great Lakes areas. Unless production of frozen fish is much greater in the next few months, reserve stocks of frozen fish may be quite short through the winter. Production of frozen fish reaches its seasonal peak in the months of June, July, August, and September, and is low during the winter.

Civilian supplies of canned fish in 1945-46 may be about 30 percent smaller than in 1944-45 despite a slightly larger pack. On a per capita basis, civilian consumption this fiscal year may be about 1.5 pounds, compared with 2.4 pounds last year, and the 5.4-pound average in 1935-39. Of the total 1945-46 pack, the U.S. military and war services are tentatively indicated to receive 35 percent, lend-lease and other exports and shipments excluding liberated areas 20 percent, liberated areas 12 percent (composed of sardines, mackerel, squid, and groundfish), and civilians the remainder. The reduction in the over-all civilian supply of canned fish is principally in salmon, sardines, pilchards, and mackerel. Most of the packs of shellfish, tuna, and other varieties of fish will be available for civilians.

Poultry and Eggs

Supplies of eggs available for civilians during the next few months will not be sufficient to meet the strong civilian demand until egg production begins its seasonal increase near the end of the year. Although civilian supplies in the second half of 1945 will be about the same as in the corresponding period of 1944, they will be about 15 percent below those of the first half of this year. Civilian egg consumption per capita for the year probably will be about 372 eggs compared with the previous record in 1944 of 351 eggs and the 1935-39 average of 298 eggs. Supplies will be shortest in the Northeast and Pacific Coast areas which are at present net importers. Farm egg production in the last half of 1945 will be 6 to 8 percent below that of the same period of 1944. However, decreases in dehydration of eggs in the second half of 1945 for non-civilian use will leave larger proportion of current production available for civilians.

Civilian egg supplies will continue at a high level in 1946. Farm egg production probably will be at least as large in 1946 as in 1945. The number of hens and pullets on farms on January 1, 1946, will be slightly larger than on January 1, 1945. Lend-lease shipments of dried eggs in 1946 are likely to be further reduced. In 1943 and in 1944 exports of dried eggs for lend-lease were about 210 to 230 million pounds. They are substantially smaller this year. Recent reports indicate that the United Kingdom, which received about two-thirds of the dried eggs shipped in 1944, is receiving some shell eggs from Denmark and that production of eggs in Great Britain is increasing. Dried eggs also have been going to Russia; shipments for the fiscal year 1944-45 totaled 97 million pounds.

Supplies of chicken meat are increasing seasonally. For the remainder of 1945, total civilian supplies may not be much different from those of the same period in 1944. However, the regional distribution is somewhat changed. Supplies in the Northeast will be smaller than last year, primarily because of large Army procurement in the Delmarva Peninsula and Shenandoah Valley. Recently the Army procurement program from these areas was somewhat reduced and there will be some increase in supplies for the northeastern metropolitan centers compared with the first half of 1945.

The prospect for civilian supplies of poultry in the first part of 1946 is for some increase over the first part of 1945. Army requirements may be somewhat reduced from present levels, although a significant part of the total supply will still be needed to fill them. Furthermore, production of commercial broilers may be larger than in the first part of 1945.

Civilians probably will receive during 1945 a record quantity of turkey despite large Army procurement. In the past 2 years the armed forces have purchased about 1/5 of the total turkey production. Production this year is indicated to be at least 600 million pounds, 10 percent more than the 1944 record. Despite large procurement for the armed forces, civilian consumption may be about 3.8 pounds of turkey meat per capita compared with 3.3 pounds per capita in 1944. Even so, civilian demand at ceiling prices is expected to exceed available supplies in many areas. Many more people can afford to buy turkey meat than in pre-war years because of the high level of consumer incomes. In addition, civilian demand for turkey is unusually strong because of short supplies of meat.

Dairy Products

Record supplies of fluid milk and skim-milk products will continue to be available for civilian consumption during the remainder of 1945. Milk production on farms is expected to reach an all-time high this year; pasture conditions are good, and the demand for fluid milk in most areas is being met in full. Per capita consumption of fluid milk and cream may be around 432 pounds in 1945 compared with about 423 pounds in 1944 and the 340 pound average for 1935-39 (whole milk equivalent basis). In terms of milk-solid content, the consumption of skim-milk products during 1945 probably will be 10 pounds per capita, 5 percent above last year, and almost 16 percent above the pre-war average.

In contrast with the high levels of fluid milk and skim-milk products available, civilian supplies of most manufactured dairy products will continue short of demand. Production of most whole-milk manufactured products (cheese, evaporated milk, dried whole milk) will be at or near all-time peaks. However, large noncivilian procurement probably will leave smaller supplies of most of these products than were available for civilians in pre-war years but slightly above 1943 and 1944. Evaporated milk production will probably reach an all time high of 3,900 million pounds. Although about 1/3 of 1945 production is being taken by the U. S. armed forces and 1/6 for lend-lease and liberated areas, per capita civilian consumption will probably be about 17 pounds, almost as large as the 1940 record. A larger proportion of condensed milk supplies is available for civilians so consumption in 1945 may average 1.7 pounds per capita, about the same as last year. Output of American cheddar cheese is nearly as large as the 1942 record rate. In addition, production of other whole-milk cheeses may reach a new high. Civilian consumption of all whole-milk cheeses is expected to be between the pre-war average (1935-39) of 5.5 pounds and the 1944 consumption of 5.0 pounds.

Civilian butter supplies may be somewhat larger in the next 6 months than in either the first half of 1945 or the last half of 1944. Creamery butter production is expected to be greater than in the same period of 1944 because of higher dairy production payments and because milk production is greater this year than last in some of the more important butter producing areas. Furthermore, non-civilian takings in the last half of this year are likely to be smaller than in the same period of 1944.

For the first part of 1946, milk production should continue at a high level if there are adequate feed supplies and if returns continue to be favorable. This would permit a continuation of the present large production of whole milk products, principally evaporated milk, cheese, and dried whole milk, as well as record fluid milk consumption. Civilian supplies of most of the manufactured products, however, are not expected to increase materially. Military takings of evaporated milk will be large because of its suitability for the needs for the Pacific theater. Furthermore, it is probable that a large amount of evaporated milk and cheese will be used for emergency civilian relief feeding.

Fats and Oils

Civilian supplies of food fats and oils in 1945, on a per capita basis, are the smallest in more than 20 years. Total supplies per capita for the year are estimated about 38 pounds (fat-content basis) compared with about 42 pounds in 1944 and an average of 45 pounds annually in 1935-39. At current prices and incomes, civilians probably would consume about 50 pounds of fat per capita if supplies were freely available.

Principal reasons for the sharp decline in civilian supplies from 1944 are (1) a 28-percent reduction in the pig crop last year, reflected this year in a similar reduction in lard output; (2) increased military procurement in 1945; and (3) continuation in 1945 of relatively large exports, with shipments to liberated areas for relief partly offsetting the reduction in lend-lease.

Output of lard and rendered pork fat in 1945 is expected to total about 2,225 million pounds compared with 3,215 million pounds in 1944. Around 140 million pounds of lard will be used this year in manufacture of margarine, shortening, soap and other nonfood products. Military procurement, exports, and shipments of lard in 1945, on the basis of the most recent indications, may total about 900 million pounds, compared with over 1 billion pounds in 1944. Part of these requirements have been met out of stocks carried over at the beginning of the year. Factory and warehouse stocks of lard and rendered pork fat have been reduced about 250 million pounds since January 1, and are now near minimum working levels. Civilian supplies of lard (for direct food use) will be about 1.5 billion pounds this year compared with approximately 1.8 billion pounds last year, a decline of around 16 percent. In per capita terms, civilian lard supplies may be less than 12 pounds in 1945, compared with about 14 pounds in 1944.

Military requirements for shortening and edible oils in 1945 are materially larger than in 1944. Estimated civilian supplies of margarine, shortening, and oils this year total less than 2.4 billion pounds (fat content) compared with civilian takings of nearly 2.5 billion pounds in 1944, a decline of about 3 percent.

Civilian supplies of butter are smaller this year than last. Production in 1945 is expected to be about 1,740 million pounds compared with 1,816 million pounds in 1944. Military procurement and exports probably will be about the same in total in 1945 as a year earlier, when noncivilian use was met partly out of stocks. Stocks of butter were comparatively small on January 1, 1945. Estimated civilian supplies of butter for the year 1945 are down 11 percent from 1944 and more than 35 percent from the 1935-39 average. However, civilian butter supplies may be somewhat larger in the next 6 months than in either the first half of 1945 or the last half of 1944.

Changes in lard output will be a key factor in the food-fat situation in coming months. Because lard competes closely with shortening and because demand for shortening, in turn, is a major factor in demand for the primary edible vegetable oils (cottonseed, soybean, corn, and peanut oils), an increase in lard would tend to ease the situation for other food fats.

Lard production usually reaches a seasonal low point in August and September. Output in the July-September quarter this year may be 25 to 30 percent less than a year earlier, reflecting the sharp decrease in the 1944 fall pig crop. Hogs from the 1945 spring pig crop will be marketed from October 1945 through April 1946. This crop was 7 percent smaller than that produced a year earlier; hence lard output probably will continue at a relatively low level until next spring. In late April next year, however, slaughter of hogs from the 1945 fall pig crop will begin. This crop is indicated to be 13 percent larger than the 1944 fall pig crop. Lard output in the spring and summer of 1946 may be 100 million pounds greater than in the present season.

Inventories of fats and oils are now at the lowest level for the season in many years. This is in sharp contrast to the situation a year ago, when stocks were at a record high level. Most of the change has been in lard stocks which are now below normal. A year ago lard stocks were at a record high level.

Factory and warehouse stocks of lard and of all fats and oils, specified dates, 1944-45

| Item | 1944 | | | | 1945 | |
|---|---|---|---|---|---|---|
| | Mar. 1 | June 1 | Sept. 1 | Dec. 1 | Mar. 1 | June 1 |
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| Lard and rendered pork fat | 396 | 655 | 610 | 382 | 226 | 117 |
| All fats and oils | 2,476 | 2,682 | 2,460 | 2,123 | 1,983 | 1,729 |

Compiled from reports of the Bureau of the Census, except butter, from U.S.D.A., cold-storage holdings.

With the number of men in the armed forces at full strength and with a large number of prisoners of war, military procurement of food fats and oils reached a peak in the first half of 1945. On the basis of latest indications, total military procurement of food fats and oils in 1945 (exclusive of procurement for European relief) would be approximately 770 million pounds, 150 million pounds more than a year earlier. Takings in the second half of 1945 probably will be somewhat smaller than in the first half, but more than in the second half of 1944.

Exports and shipments of fats and oils in 1945 probably will be substantially smaller than a year earlier. This is largely because of reduced supplies. With the end of the war in Europe, lend-lease shipments of fats and oils have been materially reduced, but import demand from the liberated areas of Europe is strong. These countries doubtless would take at least enough to offset the reduction in lend-lease shipments, if supplies were made available. Total imports of fats, oils, and oilseeds in terms of oil into continental Europe, excluding Russia, averaged about 4.5 billion pounds before the war. This year, because of the world shortage in fats and oils outside the Japanese-controlled area, probably less than 2 billion pounds will be imported into the Continent.

Fruit

The 1945 fruit crops are expected to total about 7 percent less than last year's although about 20 percent more than the pre-war (1935-39) average. The reduction from last year's total results from a substantial decrease in the apple crop and smaller sour cherry and apricot crops. About 55 percent of this year's fruit production is deciduous and 45 percent citrus. A little more than half of the deciduous fruit supplies are processed, but only 30 percent of the citrus. The supplies of fruits, in both fresh and processed forms, for civilian consumption during the calendar year 1945, are much the same as in 1944 because of the large stocks of apples and pears carried over from last year's crops and some increase in the imported supplies.

Fresh Fruits - Total supplies of fresh fruit for 1945 include, in addition to current domestic production, a substantial carry-in of apples and pears from the 1944 crops and large imports of various fruits, mostly bananas. The total for 1945 is expected to be nearly 11 million tons, nearly as much as in 1944 and slightly more than the average for 1935-39. Smaller production this year is nearly offset by increased carry-in stocks and imports. Of this year's anticipated supply of fresh fruits, about 83 percent is from the new domestic crop, 10 percent from imports, and 7 percent from stocks.

Most of the 1945 crop of deciduous fruits will be harvested during the second half of the year. The carry-over of apples will be much smaller than on January 1, 1945 because of the short crop. There may be a slight increase in imports of bananas during coming months, and small quantities of apples again may be imported from Canada. Above-average supplies of California Valencia oranges and lemons will be available this summer, but market distribution of these fruits may be less uniform than normal because of transportation difficulties. Supplies of fresh citrus fruits from the new 1945-46 crop are expected to be generally adequate next fall as well as in the first half of 1946.

Total demand for fresh fruit has been sufficiently strong thus far in 1945 to maintain prices at or near ceiling levels, except for brief intervals for some fruits. Military requirements for fresh fruit in 1945 are about one-fifth larger than the 500,000 tons taken in 1944. Most of the increase is in citrus fruits, which are expected to comprise about two-thirds of the total taken this year. Exports to foreign countries and shipments to U.S. Territories this year probably will be slightly less than the 400,000 tons shipped last year.

Total supplies of fresh fruits available to civilian consumers in 1945 aggregate about 9.3 million tons. This means a civilian per capita supply of about 144 pounds, nearly the same as in 1944 and about 5 pounds more than the 5-year (1935-39) average. These figures are on an annual basis. However, supplies of many fresh fruits, especially deciduous, are highly seasonal, being in greatest supply during and immediately after harvest time in summer and fall, and in lowest supply in winter and spring. Civilian supplies during the first half of 1946 are likely to be at least one-fourth smaller than during the second half of 1945, and slightly smaller than in the first half of 1945.

Geographic distribution of fresh fruit supplies will be conditioned by the size of the crops in different producing areas and the ability of the various transportation systems and marketing agencies to move products to the heavy consuming areas.

Canned fruits - The prospective civilian supply of canned fruits in 1945-46 is much the same as the quantity consumed during the 1944-45 pack year, about 10 pounds per capita. Smaller stocks at the beginning of the pack year and a probable slight decrease in packs will about offset the small increase in imports and the probable small decrease in military takings. The continued small civilian supply would fall quite short of what consumers would buy if the supply were larger and not rationed.

The domestic pack of canned fruits may total about 2,060 million pounds, or 47 million cases of 24 No. 2-1/2 cans, compared with 48 million cases in 1944-45. Peaches, apricots and pears are expected to comprise about one-half of the domestic pack. Imports of canned pineapples, olives, and other fruits are likely to reach 500 million pounds. About half of the supply of canned fruits available for consumption (i.e., excluding minimum working stocks) will go to the armed forces. A small amount is scheduled for the military forces of our allies and only a negligible quantity for other exports. Thus, civilian supplies will continue to be about 2/3 of the 1935-39 average consumption.

Canned fruit juices - The total canned fruit juice supplies for civilian consumption will continue to be sufficient to fill consumer demand and are of record size. Certain juices will be short, but others, particularly citrus, will be plentiful. Civilian consumption of canned fruit juices per capita has increased greatly, from 4 pounds in 1935-39 to about 10.3 pounds in 1945.

Military requirements are taking about 30 percent of the year's total supply of canned fruit juices, over 500 million pounds. They have increased each year during the war because they are satisfactory for troop feeding, as well as popular with service men. Canned citrus juices retain a fairly high proportion of the vitamin C of the fresh fruit.

Total supplies of commercially canned fruit juices for the 1944-45 season ending late next fall (roughly the 1945 calendar year) are indicated to be about 2.3 billion pounds (the equivalent of about 55 million cases of 24 No. 2-1/2 cans). Supplies for the 1943-44 season amounted to about 2.2 billion pounds. Total supplies for the 1944-45 season include a domestic pack of about 1.7 billion pounds, carry-in stocks of about 300 million pounds, and in-shipments and imports of about 250 million pounds. Most of the domestic pack of canned fruit juices consists of citrus, and most of the in-shipments are pineapple. Preliminary indications point to a domestic pack for the 1945-46 season about equal in size to the 1944-45 pack.

Dried Fruits - Production of dried fruits for the 1945-46 season may be about as large as the 569,000 tons, processed weight, packed in the 1944-45 season. Since raisins and dried prunes will comprise about three-fourths of the new pack, the total supply will depend on the quantities packed of these two fruits, especially raisins.

Exports, lend-lease shipments, and military takings for the season ahead may be somewhat smaller than the total of 274,000 tons (processed weight), for these three items in the 1944-45 season. Civilian supplies for the 1945-46 season probably will be slightly smaller than the 5.6 pounds per capita (processed weight) of the preceding season, which was equal to the pre-war average.

Frozen Fruits - Production of commercially frozen fruit in 1945 is expect to be about as large as the record pack of 330 million pounds in 1944, and about 3 times the 5-year (1935-39) average of 106 million pounds. About 15 percent of the supply goes to the military, and the remainder to civilian whose supply in 1945 is expected to average about 2.2 pounds per capita compared with 1.9 pounds in 1944 and 0.7 pounds, the average for 1935-39.

Vegetables

Fresh vegetables - If present prospects for fresh vegetable production are realized, supplies of fresh vegetables will be adequate, in general, to meet civilian demand and consumption may average about 257 pounds per capita. This is a slightly higher rate than last year and about 9 percent above the 5-year average, 1935-39. Fresh vegetables will furnish about 30 percent of the average per capita civilian supply of vitamin A and 50 percent of the vitamin C (ascorbic acid.)

The commercial production of vegetables (excluding potatoes, sweet potatoes, dry beans and dry peas) for fresh market shipment may equal or slightly exceed the 1944 record production. The supply of some 257 pounds of fresh vegetables per capita also includes estimated production in market gardens not regularly reported and in farm gardens. In addition to these supplies, many civilians have the produce of their own Victory Gardens. The weather has been reasonably favorable to vegetable production so far this year and acreages harvested may total about 10 percent more than the pre-war average (1935-39).

The international trade in fresh vegetables in negligible, mostly a seasonal interchange of a few items, such as tomatoes, onions, peppers and watermelons, which move between the United States and adjacent countries to provide "out of season" supplies. In response to the favorable demand and price situation in this country, imports of fresh vegetables so far in 1945 have been much higher than usual. They may total 430 million pounds for the year.

Military and war service requirements for fresh vegetables in 1945 may be larger than last year because of the large numbers of troops in this country being transferred to the Pacific theater. Even so, they will take less than 5 percent of the probable total supply.

Tentative goals for winter-season truck crops for 1946 in general call for as large a production in that year as was produced in 1945. Given averag growing conditions, there appears to be every likelihood of production in the first half of 1946 adequate to meet demand at or near ceiling prices.

Problems in distribution of fresh vegetables for the remainder of 1945 and during the first half of 1946 are expected to center primarily around local spot surpluses and transportation difficulties. Attempts are being made to meet some of these problems in advance by suggestions to grower (goals) as to volume of production needed and as to areas likely to encounter transportation problems. Even so, the shortage of railway cars for shipping fresh vegetables may lead to diversion of some fresh market supplies to processing and probably more wastage than usual.

Canned vegetables- The supply of canned vegetables available for civilian consumption in the 1945-46 pack year may be about 29-31 pounds per capita, about 1/8 smaller than in the previous year, a little less than the average for the 5 years 1935-39, and the smallest since the middle thirties. This reduction from previous levels comes about--despite a probable pack this year about the same size as in 1944-45--primarily as a consequence of reduced commercial stocks on hand at the beginning of this pack year, and continued heavy takings for the U. S. military and war services.

In spite of some demobilization, military requirements for canned vegetables remain high for this pack year because of the necessity for filling the long "pipe-lines" to the Pacific war areas. It is expected that exports and shipments of canned vegetables in 1945-46 will be considerably below the previous pack year when about 210 million pounds went for uses other than military or U. S. civilian consumption. Much of the domestic demand for canned vegetables is not being met and the economy and nutritional value per pound of other foodstuffs such as cereals are superior for relief feeding purposes.

Frozen vegetables- Because of some increase in military requirements, the civilian supply of frozen vegetables may be slightly smaller in this calendar year than in 1944, when per capita consumption was about 1.6 pounds. Military requirements in 1945 for frozen vegetables, however, call for less than one-seventh of the total supply. The effect upon available supplies of estimated increases in the pack of frozen vegetables this year compared with 1944 is about offset by the effect of lower stocks at the beginning of 1945. Foreign trade in frozen vegetables is virtually non-existent.

Dehydrated vegetables- Total production of dehydrated vegetables in 1945-46 is indicated at about 265 million pounds, and will be primarily on a contract basis for the military and war services, with smaller quantities for lend-lease, liberated areas, and commercial exports and shipments. A large part of the lend-lease shipments of dehydrated vegetables is for the use of allied military forces Nearly three-fourths of the anticipated production will be composed of potatoes and sweetpotatoes. Pre-war production of dehydrated vegetables was at an annual rate of less than 8 million pounds. In the fiscal year 1944-45, production was roughly 209 million pounds.

Potatoes and sweetpotatoes- Civilian supplies of potatoes are expected to be slightly larger in 1945-46 than they have been this past year. Although potato production of over 400 million bushels would be substantially larger than in 1944-45, the increase in military and other non-civilian requirements and the decrease in imports will offset to a considerable extent the increase in productio

Anticipated noncivilian requirements for potatoes in 1945-46 are at the highest levels yet reached. Procurement for the military services in particula and for lend-lease and liberated areas will take all the dehydrated potatoes that can be obtained by operating dehydrating plants at capacity. The strategic importance of dehydrated potatoes lies not so much in the saving of bulk and weight, though that is considerable, as it does in their non-perishability compared with freshpotatoes. Canned potatoes have proven more palatable than dehydrated, and more than the estimated one-half million bushels would be so used in 1945-46 were it not for the shortage of cans and manpower.

Military requirements for fresh potatoes remain very high, primarily because of needs in connection with the redeployment through the U. S. of large numbers of troops from European to Pacific areas. However, it has been observed that the rate of demobilization and the transfer process are proving to be faster than was first anticipated; therefore takings of fresh potatoes for the military and war services in 1945-46 may not be much above the 34 million pounds taken in 1944-45.

After allowance is made for the use of potatoes for domestic seed, starch feed and waste, as well as for the military requirements, the remaining supply of potatoes is less than the desired quantities for export and shipments (including liberated areas,) and for civilian consumption. Because of the problem of shipping fresh potatoes without efficient refrigeration and because of heavy domestic demand, the total quantities of fresh potatoes shipped out of the country (excluding military) will be negligible. Prospective civilian supplies in 1945-46 are about 124 pounds per capita slightly higher than in 1944-45, but about 5 percent below the 1935-39 average and less than full consumer demand.

The 1945-46 crop of sweetpotatoes is indicated to be below the 10-year average, 1934-43, and heavy demand is anticipated both for civilian and military consumption. It is probable that only nominal quantities will be exported. Procurement for the armed forces may take less than 10 percent of the supply available for food. The quantity of sweetpotatoes in fresh form needed by the services is about 25 percent higher for this fiscal year than estimated takings in 1944-45.

Dehydrated sweetpotatoes have proved to be one of the most acceptable of all dehydrated foods, and the quantity that probably will be so utilized by the military forces in this fiscal year (2.3 million bushels, fresh basis) is limited only by the practical operating capacity of plants dehydrating sweetpotatoes. The quantity of sweetpotatoes to be canned is limited primarily by availability of cans.

Civilian supplies of sweetpotatoes in 1945-46 are expected to be about 19 pounds per capita, about 2 or 3 pounds less than this past year and about 20 percent below 1935-39 average consumption.

Dry edible beans and peas - The U. S. civilian supply of dry edible beans in the 1945-46 crop year is expected to be somewhat smaller than in 1944-45. The prospective smaller per capita supply than in recent years results from a reduction in acreage in 1945, a limited carry-over from previous crops, as well as heavy non-civilian needs. Combined commercial and farm stocks at the beginning of the 1945-46 crop year, (September 1) are expected to be much smaller than a year earlier. Department of Agriculture stocks have been rapidly reduced in recent months and may be negligible by September 1. Indications are that imports of dry beans have been at about the 1935-39 average level during the 1944-45 crop year, and they are expected to increase during the next drop year.

Military procurement from the 1945-46 crop year supply probably will be only about two-thirds as large as for 1944-45 because the military responsibility for relief feeding in liberated Europe is being terminated. Department of Agriculture purchases for lend-lease and liberated areas will be considerably reduced because of the smaller available supply. For this reason, commercial exports and shipments also will be limited. Commercial stocks carried over at the end of the 1945-46 crop year probably will reach a new low level.

Apparent civilian consumption of dry peas annualy in the past 10 crop years has varied from about one-fourth pound to one pound per capita. It averaged one-half pound for the 5 years 1935-39. For the 1945-46 crop year just ahead, it is expected to be much the same as in the preceding crop year. The production for 1945 may be about three-fourths the size of the 1944 crop, and more than double the average crops produced in the 5 years 1935-39, when no special incentives were given growers to encourage production.

Commercial stocks of dry peas at the beginning of the 1945-46 crop year may be considerably smaller than the previous year's stocks. Department of Agriculture stocks of dry peas probably will be closed out during 1945-46.

Military procurement, primarily for relief feeding purposes, may be only about one-third as large in 1945-46 as in the preceding crop year, as the result of the termination of the military responsibility for relief feeding in Europe.

Dry wrinkled peas, which normally are used as seed, have proved unpopular for food purposes, and production programs have been revised accordingly. More than four-fifths of the anticipated production will be dry smooth peas.

Food Grains

An ample domestic supply of grain for food in 1945-46 is assured by the record wheat crop now being harvested. As of July 1, a crop of 1129 million bushels is indicated, slightly more than the 1944 crop. Supplies of wheat from the new crop are supplemented by stocks of about 315 million bushels on hand July 1.

During 1945-46, civilian consumption of wheat products is expected to increase slightly because of the short supplies of some other foods. In fact, wheat products will furhish about one-fourth of the 1945 United States civilian supply of protein, calories, and iron and nearly one-third of the supply of two vitamins, thiamine and niacin. Total military procurement of wheat may be very large since it will include large quantities for relief feeding in the Pacific. Wheat is being substituted for rice by the military for civilian use in Pacific areas because the United States rice supplies are very inadequate to supplement supplies of the Far East. More than 200 million bushels of wheat, including flour in wheat equivalent, are expected to be shipped in 1945-46 for military relief, lend-lease, liberated areas, and under commercial contracts. The use of wheat for feed and industrial alcohol will depend on the availability of other grains. Total disappearance of wheat in 1945-46 may be so great as to reduce the carry-over on July 1, 1946 somewhat below the 1945 quantity.

Early prospects are that the 1945 world wheat production, excluding that of the U.S.S.R. and China, may be slightly below the production in 1944. Favorable weather for the rest of the season will be necessary for Canada to produce an average crop. European production is expected to be below average for the sixth successive year and the crop in North Africa is very poor, because of the drought. The drought in Australia was finally broken in June, and conditions in Argentina have been generally favorable for seeding. Wheat stocks in the four major exporting countries -- Canada, Argentina, Australia, and the United States -- on July 1, 1945 total about 900 million bushels, which is above the 10-year (1932-42) average of 734 million bushels.

It is too early to appraise the world wheat supply situation for 1945-46 accurately, but it appears that supplies will exceed requirements. Accordingly, the problem of meeting needs of liberated Europe and importing countries is not one of supply. Rather, it is one of movement. The movement of the large quantities urgently needed is placing a heavy burden on United States and Canadian railroads, for it is from these countries that most of the supplies must come. Moreover, the lack of facilities at ports for unloading bulk grain and the disruption of inland transportation in Europe are also seriously interferring with movement of grain. In view of of the inadequate supplies of bags and bagging facilities in the exporting countries, the basic problem is that of expanding the port intake capacity for bulk grain in Europe.

The 1945 rye crop in the United States was indicated at 27.3 million bushels, on July 1. This is above the 25.9 million bushels produced in 1944, but below the 10-year (1934-43) average of 41.4 million bushels. With a carryover on July 1, 1945 estimated at about 14 million bushels, domestic supplies available in 1945-46 would total about 41 million bushels. Preliminary estimates of the distribution of these supplies are as follows, in million bushels: Food, 8; feed, 13; seed, 8; industrial and beverage alcohol, 1; exports including European food relief, 3; and carryover July 1, 1946, about 8 million bushels which would be somewhat below average. Such a distribution involves curtailed use of rye for feed and alcohol in the United States and restrictions on exports. Per capita food consumption in the United States in 1945 may be about 2.5 pounds of rye flour, which is somewhat below the 2.8 pounds estimated for 1944.

While no world supply figures for rye are available, it is known that stocks and prospective supplies in other exporting countries are small. However with large supplies of wheat, bread-grain food requirements should be fully satisfied in 1945-46, barring difficulties of transportation and processing and distribution of these products to the areas where needed.

The July crop report indicated a rice crop of 74.8 million bushels, which would be the largest ever produced in the United States and about 6 percent above the record in 1944. The large crop is based on near records of both acreage and yield. The prospective demands for military and civilian food in the Orient are so great, however, that if any substantial portion of this demand is met, civilian consumption may fall below the 1935-39 average of 5.7 pounds per capita.

The supplies of corn, oats, and barley on hand and in prospect for 1945 probably will be large enough to meet the indicated requirements for increased civilian demand for food and industrial products and all non-civilian food requirements now foreseen although the supply for feed purposes is indicated to be somewhat smaller

than the large supply for 1944-45. Corn sugar and sirup consumption may be larger than in 1944 because of reduced supplies of other sugars. Oatmeal consumption is expected to be as large as in 1943 because of the short supplies of meats and some other foods. There may be little or no change in the consumption of barley food products.

Sugar

Civilian sugar supplies will be shorter in the second half of 1945 than they were in the first 6 months or in 1944. Despite the considerably smaller quantity of sugar available for the year 1945, the rate of use of sugar in the first half of 1945 was slightly larger than in the first half of 1944. The total decrease in consumption must all come in the July-December period and will be more difficult because of the fact that sugar consumption by civilians is normally about 10 percent larger in the second half of the year than in the first half. Most of the commercial and home canning and preserving is done after July 1.

The shortage of sugar for the remainder of 1945, as compared with the situation in 1944 and early 1945, results from the short crop in Cuba this year, heavy reduction in sugar stocks in the United States in 1944, and increased need for sugar for liberated areas. Stocks of sugar in the United States were reduced about 500,000 tons during the calendar year 1944 and are now at minimum operating levels. Imports will total no more than 5.1 million short tons (raw value), compared with 5.5 million in 1944.

Cuban production in 1944 amounted to 5.6 million tons, of which the equivalent of 900,000 tons of sugar was used for high test molasses imported by the United States for the manufacture of alcohol needed for use in the making of synthetic rubber and other war-essential products. A severe drought greatly reduced yields in 1945 and resulted in a low Cuban crop of approximately 3.9 million tons. Sugar production in the United States is expected to be larger this year than last-- perhaps totalling 1.9 million short tons, against 1.5 million in 1944. Reduced crops of beet sugar in the liberated countries of Europe have made it necessary to increase substantially the amount of sugar sent to those areas to the total of about 160,000 short tons in the second half of 1945 compared with 130,000 tons in the first half of 1945, and practically none last year.

Supply and distribution of sugar, raw value, 1935-39, 1944, and tentative indications for 1945. Unit: 1,000 short tons.

| Year | Production | Off-shore receipts | Beginning stocks | Total supply | Ending stocks | Non-civilian use | Civilian use-total | Civilian per capita (refined) |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Pounds |
| 1935-39 | 1,948 | 4,867 | 2,678 | 9,493 | 2,684 | 109 | 6,700 | 96.5 |
| 1944 | 1,512 | 5,476 | 2,221 | 9,209 | 1,696 | 1,355 | 6,158 | 89.0 |
| 1945 (tentative indications) | 1,900 | 5,000 | 1,696 | 8,596 | 1,846 | 1,750 | 5,000 | 72 |

Out of the short total United States sugar supplies, United States civilians may get 2.3 million tons (raw value) in the second half of 1945. The per capita annual rate of consumption would be 66 pounds in the July-December period, compared with a rate of 78 pounds for the first half of the year. Civilian consumption averaged 89 pounds in 1944 and 96.5 pounds in the period 1935-39.

Military takings of sugar for troop use in the second half of 1945 will total about 550,000 tons, less than in the first half of 1945 but slightly more than in the second half of 1944. In addition, the armed forces are expected to distribute in liberated areas about 1/3 of the 290,000 tons of sugar to be exported.

Present prospects indicate that the supply of sugar for civilians for 1946 will be somewhat larger than it will be for the last half of 1945, but it will still be much below the demand. The production of beet sugar in Europe this fall is indicated to be definitely below what it was in 1944. Consumption will continue to be much below prewar. An increase over 1945 in beet sugar production in Europe is likely in 1946 as the area recovers further from the effects of the war.

The production of sugar in Cuba in 1946 probably will not be as low as it was this year when a severe drought greatly reduced yields. However, dry weather in Cuba continued long enough to affect the yields of the crop to be harvested in the early months of 1946.

It is not likely that the United States will obtain any significant quantity of sugar from the Philippine Islands before 1947. The Japanese were interested in the production of rice and cotton rather than sugar in the Philippines; consequently many sugarcane fields were neglected or plowed up and their reestablishment will take considerable time. However, the Philippine Islands are likely again to become an important source of sugar for the United States within a few years.

The present shortage of sugar is world-wide, although it affects importing countries such as the United States most acutely. It will probably be several years before important sugar producing areas such as Europe, the Philippine Islands and Java recover sufficiently from the effects of war to regain something like their prewar output. Until that time sugar supplies are likely to remain relatively short.

Table 6.- Part 1 Meats, supply and distribution, calendar years, 1935-39 average and 1940-45.

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Exports & shipments for export | Distribution: Dept. of Agri. net purchases | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| | | | | | A. Beef | | | | | |
| Average 1935-39 | 6,936 | 112 | 215 | 7,263 | 99 | 53 | | | 7,111 | 54.8 |
| 1940 | 7,182 | 77 | 168 | 7,427 | 107 | 55 | | | 7,265 | 54.7 |
| 1941 | 8,092 | 107 | 302 | 8,501 | 135 | 98 | 9 | 235 | 8,024 | 60.5 |
| 1942 | 8,831 | 135 | 225 | 9,191 | 127 | 15 | 41 | 904 | 8,104 | 61.2 |
| 1943 | 8,523 | 127 | 237 | 8,887 | 185 | 34 | 178 | 2,056 | 6,434 | 49.6 |
| 1944 | 9,137 | 185 | 10 | 9,332 | 89 | 40 | 21 | 2,059 | 7,123 | 55.1 |
| 1945 | 9,920 | | | | | | | | | 51-54 |
| | | | | | B. Veal | | | | | |
| Average 1935-39 | 1,038 | | | 1,038 | | | | | 1,038 | 8.0 |
| 1940 | 978 | | | 978 | | | | | 978 | 7.3 |
| 1941 | 1,029 | | | 1,029 | | | | 26 | 1,003 | 7.6 |
| 1942 | 1,139 | | 2 | 1,141 | 10 | 3 | 1 | 83 | 1,054 | 8.0 |
| 1943 | 1,160 | | 1 | 1,161 | 10 | 3 | 20 | 100 | 1,028 | 7.9 |
| 1944 | 1,595 | 10 | | 1,605 | 6 | 3 | 31 | 111 | 1,454 | 11.2 |
| 1945 | 1,560 | | | | | | | | | 11 |
| | | | | | C. Lamb and Mutton | | | | | |
| Average 1935-39 | 871 | 5 | | 876 | 6 | 2 | | | 868 | 6.7 |
| 1940 | 877 | 5 | | 882 | 5 | 3 | | | 874 | 6.6 |
| 1941 | 925 | 5 | | 930 | 8 | 3 | - | 13 | 906 | 6.8 |
| 1942 | 1,045 | 8 | 1 | 1,054 | 21 | 2 | 26 | 57 | 948 | 7.2 |
| 1943 | 1,104 | 21 | 1 | 1,126 | 32 | 4 | 139 | 127 | 824 | 6.4 |
| 1944 | 1,023 | 32 | - | 1,055 | 13 | 5 | 168 | 116 | 853 | 6.6 |
| 1945 | 1,030 | | | | | | | | | 7 |

General information on sources and methodology given at the end of Table 6. (cont'd

Table 6 Part 1.- Meats, supply and distribution, calendar years, 1935-39 average and 1940-45 - Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l Exports & shipments | Distribution: Dept. of Agri. Net purchases for export | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| | | | | | D. Pork (excluding lard) | | | | | |
| Average 1935-39 | 7,337 | 502 | 47 | 7,886 | 458 | 142 | | | 7,286 | 56.1 |
| 1940 | 9,958 | 469 | 7 | 10,434 | 656 | 163 | | | 9,615 | 72.4 |
| 1941 | 9,447 | 656 | 12 | 10,115 | 459 | 88 | 565 | 173 | 8,830 | 66.6 |
| 1942 | 10,723 | 459 | 1 | 11,183 | 483 | 50 | 1,543 | 963 | 8,139 | 61.5 |
| 1943 | 13,349 | 488 | 7 | 13,844 | 478 | 39 | 2,565 | 1,382 | 9,380 | 72.4 |
| 1944 | 12,893 | 478 | - | 13,371 | 316 | 53 | 1,368 | 1,718 | 9,916 | 76.7 |
| 1945 | 10,190 | | | | | | | | | 51-53 |
| | | | | | E. Total Meats | | | | | |
| Average 1935-39 | 16,182 | 619 | 262 | 17,063 | 563 | 197 | | | 16,303 | 125.6 |
| 1940 | 18,995 | 551 | 175 | 19,721 | 768 | 221 | | | 18,732 | 141.0 |
| 1941 | 19,493 | 768 | 314 | 20,575 | 602 | 189 | 574 | 447 | 18,763 | 141.4 |
| 1942 | 21,738 | 602 | 229 | 22,569 | 636 | 70 | 1,611 | 2,007 | 18,245 | 137.9 |
| 1943 | 24,136 | 636 | 246 | 25,018 | 705 | 80 | 2,902 | 3,665 | 17,666 | 136.3 |
| 1944 | 24,648 | 705 | 10 | 25,363 | 424 | 101 | 1,488 | 4,004 | 19,346 | 149.6 |
| 1945 | 22,700 | | | | | | | | | 120-125 |

General information on sources and methodology given at the end of Table 6.

Table 6, Part 2.- Poultry and eggs: Supply and distribution, calendar years 1935-39 average and 1940-1945

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. Net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | lb. |
| | | | | | A. Chicken (dressed weight) | | | | | |
| Average 1935-39 | 2,325 | 109 | 2 | 2,436 | 109 | 2 | | | 2,325 | 17.9 |
| 1940 | 2,423 | 109 | 2 | 2,534 | 140 | 2 | | | 2,392 | 18.0 |
| 1941 | 2,642 | 140 | 2 | 2,784 | 161 | 3 | | 52 | 2,568 | 19.4 |
| 1942 | 2,988 | 161 | 3 | 3,152 | 149 | 2 | 22 | 135 | 2,844 | 21.5 |
| 1943 | 3,804 | 149 | 2 | 3,955 | 1/ 178 | 1 | | 148 | 3,628 | 28.0 |
| 1944 | 3,460 | 1/ 178 | 22 | 3,660 | 1/ 134 | 7 | | 470 | 3,048 | 23.6 |
| 1945 | 3,300 | | | | | | | | | 21.5 |
| | | | | | B. Turkey (dressed weight) | | | | | |
| Average 1935-39 | 350 | 24 | - | 374 | 31 | | | | 343 | 2.6 |
| 1940 | 482 | 52 | - | 534 | 61 | | | | 473 | 3.6 |
| 1941 | 468 | 61 | 1 | 530 | 50 | | | 8 | 472 | 3.6 |
| 1942 | 496 | 50 | 1 | 547 | 36 | | 5 | 18 | 488 | 3.7 |
| 1943 | 466 | 36 | 3 | 505 | 1/ 19 | | | 47 | 439 | 3.4 |
| 1944 | 547 | 1/ 19 | 4 | 570 | 1/ 37 | | 2 | 100 | 431 | 3.3 |
| 1945 | 600 | | | | | | | | | 3.8 |

General information on sources and methodology given at the end of Table 6.

Continued -

Table 6, Part 2.- Poultry and eggs: Supply and distribution, calendar year 1935-39 average and 1940-45 - Continued

| Year | Supply | | | | Distribution | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Production | Beginning com'l stocks | Imports | Total supply | Ending com'l stocks | Com'l exports and shipments | Dept. of Agri. Net purchases for export | Eggs used for hatching | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
| | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Mil.doz. | Number |
| | | | | | | C. Eggs | | | | | |
| Average 1935-39 | 3,335 | 78 | 18 | 3,431 | 78 | 2 | | 126 | | 3,225 | 298 |
| 1940 | 3,629 | 74 | 7 | 3,710 | 77 | 5 | | 125 | | 3,503 | 316 |
| 1941 | 3,826 | 77 | 15 | 3,920 | 92 | 12 | 173 | 147 | 62 | 3,434 | 311 |
| 1942 | 4,430 | 92 | 3 | 4,525 | 71 | 13 | 623 | 168 | 218 | 3,432 | 311 |
| 1943 | 4,972 | 71 | 1 | 5,044 | 98 | 17 | 608 | 203 | 388 | 3,730 | 345 |
| 1944 | 5,305 | 98 | 1 | 5,404 | 83 | 19 | 841 | 176 | 497 | 3,788 | 351 |
| 1945 | 4,885 | | | | | | | | | | 372 |

1/ Excludes quantities held in cold storage by the armed forces.

General information on sources and methodology given at the end of Table 6.

Table 6, Part 3.- Dairy products: Supply and distribution, calendar years, 1935-39 average and 1940-45

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for export | Domestic disappearance: Military | Domestic disappearance: Civilian | Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | lb. |
| **A. Butter, farm and factory (see Part 4)** | | | | | | | | | | |
| **B. All cheese, except full skim, cottage, pot and baker's** | | | | | | | | | | |
| Average 1935-39 | 669 | 107 | 57 | 833 | 109 | 4 | | | 720 | 5.5 |
| 1940 | 785 | 109 | 33 | 927 | 130 | 6 | | | 791 | 6.0 |
| 1941 | 956 | 130 | 20 | 1,106 | 202 | 11 | 92 | 11 | 790 | 6.0 |
| 1942 | 1,112 | 202 | 24 | 1,338 | 1/ 119 | 8 | 321 | 56 | 834 | 6.3 |
| 1943 | 993 | 1/ 119 | 25 | 1,137 | 1/ 67 | 3 | 285 | 128 | 654 | 5.0 |
| 1944 | 1,009 | 1/ 67 | 10 | 1,086 | 1/ 55 | 4 | 194 | 190 | 643 | 5.0 |
| 1945 | 1,100 | | | | | | | | | 5.3 |
| **C. Condensed and evaporated milk** | | | | | | | | | | |
| Average 1935-39 | 2,225 | 183 | 1 | 2,409 | 188 | 58 | | | 2,163 | 16.7 |
| 1940 | 2,731 | 192 | - | 2,923 | 196 | 176 | | | 2,551 | 19.2 |
| 1941 | 3,555 | 196 | - | 3,751 | 412 | 226 | 485 | 207 | 2,421 | 18.2 |
| 1942 | 3,782 | 412 | - | 4,194 | 87 | 92 | 1,157 | 435 | 2,423 | 18.3 |
| 1943 | 3,343 | 87 | - | 3,430 | 190 | 29 | 130 | 675 | 2,406 | 18.6 |
| 1944 | 3,758 | 190 | - | 3,948 | 150 | 40 | 512 | 1,155 | 2,091 | 16.2 |
| 1945 | 4,208 | | | | | | | | | 19.0 |

Continued -

General information on sources and methodology given at the end of Table 6.

Table 6, Part 3.- Dairy products: Supply and distribution, calendar years, 1935-39 average and 1940-45 - Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for export | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | lb. |
| | | | | D. Dried whole milk | | | | | | |
| Average 1935-39 | 19 | 3 | 2 | 24 | 3 | 4 | | | 17 | .13 |
| 1940 | 29 | 4 | - | 33 | 5 | 9 | | | 19 | .14 |
| 1941 | 46 | 5 | - | 51 | 6 | 16 | | 6 | 23 | .17 |
| 1942 | 62 | 6 | - | 68 | 7 | 12 | 2 | 22 | 25 | .19 |
| 1943 | 138 | 7 | - | 145 | 8 | 12 | 41 | 35 | 49 | .38 |
| 1944 | 172 | 8 | - | 180 | 16 | 14 | 36 | 79 | 35 | .27 |
| 1945 | 220 | | | | | | | | | .27 |

Continued -

General information on sources and methodology given at the end of Table 6.

Table 6. Part 3 Dairy products: Supply and distribution, calendar years, 1935-39 average and 1940-45 - Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Ending: com'l stocks | Com'l Exports & Shipments | Dept. of Agri. Net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| **E. Fluid milk and cream - (milk equivalent)** | | | | | | | | | | |
| Average 1935-39 | 44,146 | 95 | 3 | 44,244 | 101 | 1 | | | 44,142 | 340 |
| 1940 | 45,591 | 85 | --- | 45,676 | 95 | 3 | | | 45,578 | 343 |
| 1941 | 46,900 | 95 | --- | 46,995 | 228 | 9 | | 244 | 46,514 | 351 |
| 1942 | 49,514 | 228 | --- | 49,742 | 110 | 3 | | 438 | 49,191 | 372 |
| 1943 | 53,921 | 110 | --- | 54,031 | 321 | 1 | | 1,528 | 52,181 | 403 |
| 1944 | 56,144 | 321 | --- | 56,465 | 172 | | | 1,647 | 54,646 | 423 |
| 1945 | 57,449 | | | | | | | | | 432 |
| **F Total milk for human consumption 2/** | | | | | | | | | | |
| Average 1935-39 | 103,656 | 2,891 | 752 | 107,299 | 2,957 | 352 | | | 103,990 | 801 |
| 1940 | 109,341 | 2,747 | 341 | 112,429 | 2,695 | 740 | | | 108,994 | 821 |
| 1941 | 115,196 | 2,695 | 268 | 118,159 | 5,503 | 1,012 | 1,977 | 2,613 | 107,054 | 807 |
| 1942 | 118,777 | 5,503 | 640 | 124,920 | 2,030 | 608 | 6,041 | 5,284 | 110,957 | 839 |
| 1943 | 117,687 | 2,030 | 301 | 120,018 | 1,923 | 315 | 7,998 | 10,767 | 99,015 | 764 |
| 1944 | 118,504 | 1,923 | 137 | 120,564 | 1,554 | 368 | 2,753 | 13,947 | 101,942 | 788 |
| 1945 | 120,526 | | | | | | | | | 779 |

1/ Excludes cold storage stocks owned by the armed forces and the Department of Agriculture.
2/ Calculated on fat solids basis. The production of total milk for human consumption differs from total farm production of milk in that the former excludes milk fed to calves but includes off farm production while the later excludes off farm production but includes milk fed to calves. Milk fed to calves and milk produced off farms are usually of approximately equal volume.

General information on sources and methodology given at the end of Table 6. (cont'd)

Table 6, Part 4- Food Fats and Oils: Supply and distribution, calendar years 1935-39 average and 1940-45 -

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Ending com'l stocks | Com'l Exports and shipments | Dept. of Agri. 1/ Net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| | | | | | A. Butter (actual weight) | | | | | |
| Average 1935-39 | 2,170 | 64 | 9 | 2,243 | 66 | 7 | | | 2,170 | 16.7 |
| 1940 | 2,240 | 55 | 1 | 2,296 | 41 | 11 | | | 2,244 | 16.9 |
| 1941 | 2,268 | 41 | 4 | 2,313 | 114 | 13 | | 81 | 2,105 | 15.9 |
| 1942 | 2,130 | 114 | 20 | 2,264 | 3/24 | 11 | 14 | 145 | 2,070 | 15.6 |
| 1943 | 2,015 | 3/24 | 3 | 2,042 | 3/23 | 6 | 223 | 263 | 1,527 | 11.8 |
| 1944 | 1,816 | 3/23 | 2 | 1,841 | 3/19 | 6 | 2/ -29 | 312 | 1,533 | 11.9 |
| 1945 | 1,740 | | | | | | | | | 10.6 |
| | B. Lard and rendered pork fat, excluding quantity used in manufactured products. | | | | | | | | | |
| Average 1935-39 | 1,624 | 96 | | 1,720 | 104 | 192 | | | 1,424 | 11.0 |
| 1940 | 2,320 | 162 | | 2,482 | 294 | 232 | | | 1,956 | 14.7 |
| 1941 | 2,221 | 294 | | 2,515 | 199 | 170 | 253 | 21 | 1,872 | 14.1 |
| 1942 | 2,398 | 199 | | 2,597 | 4/91 | 111 | 583 | 12 | 1,800 | 13.6 |
| 1943 | 2,884 | 4/99 | 1 | 2,984 | 4/128 | 66 | 836 | 64 | 1,890 | 14.6 |
| 1944 | 2,951 | 4/128 | | 3,079 | 4/64 | 171 | 922 | 127 | 1,795 | 13.9 |
| 1945 | 2,140 | | | | | | | | | 11.6 |
| | C. Margarine (Fat content) 5/ | | | | | | | | | |
| Average 1935-39 | 303 | 4 | | 307 | 4 | 1 | | | 302 | 2.3 |
| 1940 | 257 | 2 | | 259 | 3 | 1 | | | 255 | 1.9 |
| 1941 | 297 | 3 | | 300 | 4 | 2 | 1 | | 293 | 2.2 |
| 1942 | 347 | 4 | | 351 | 4 | 4 | 47 | | 296 | 2.2 |
| 1943 | 500 | 4 | | 504 | 4 | 1 | 89 | 2 | 408 | 3.1 |
| 1944 | 479 | 4 | | 483 | 4 | 1 | 70 | 3 | 405 | 3.1 |
| 1945 | 504 | | | | | | | | | 3.3 |

Table 6 Part 4--Food Fats and Oils: Supply and distribution, calendar years 1935-39 average and 1940-45 - Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. 1/ Net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| **D. Shortening (fat content)** | | | | | | | | | | |
| Average 1935-39 | 1,529 | 43 | 4 | 1,576 | 49 | 8 | | | 1,519 | 11.7 |
| 1940 | 1,190 | 57 | 1 | 1,248 | 54 | 9 | | | 1,185 | 8.9 |
| 1941 | 1,409 | 54 | 1 | 1,464 | 53 | 10 | | 25 | 1,376 | 10.4 |
| 1942 | 1,300 | 53 | --- | 1,353 | 42 | 8 | 3 | 128 | 1,172 | 8.9 |
| 1943 | 1,438 | 42 | --- | 1,480 | 46 | 6 | 54 | 104 | 1,270 | 9.8 |
| 1944 | 1,364 | 46 | --- | 1,410 | 43 | 7 | 17 | 155 | 1,188 | 9.2 |
| 1945 | (Included with other edible oils, separate data not available) | | | | | | | | | |
| **E. Other edible fats and oils (fat content) 6/** | | | | | | | | | | |
| Average 1935-39 | 575 | 784 | 308 | 1,667 | 822 | 30 | | | 815 | 6.3 |
| 1940 | 892 | 933 | 76 | 1,901 | 860 | 44 | | | 997 | 7.5 |
| 1941 | 997 | 860 | 51 | 1,908 | 746 | 51 | | 18 | 1,092 | 8.2 |
| 1942 | 1,067 | 746 | 89 | 1,902 | 725 | 30 | 1 | 40 | 1,005 | 7.6 |
| 1943 | 1,272 | 725 | 82 | 2,079 | 742 | 48 | 102 | 71 | 834 | 6.4 |
| 1944 | 1,123 | 742 | 117 | 1,982 | 663 | 29 | 384 | 52 | 855 | 6.6 |
| 1945 | 2,407 | (Includes shortening, separate data not available) | | | | | 383 | | | 15.1 |
| **F. Total food fats and oils (including actual weight of butter)** | | | | | | | | | | |
| Average 1935-39 | 6,201 | 991 | 321 | 7,513 | 1,045 | 238 | | | 6,230 | 48.0 |
| 1940 | 6,899 | 1,209 | 78 | 8,186 | 1,252 | 297 | | | 6,637 | 50.0 |
| 1941 | 7,192 | 1,252 | 56 | 8,500 | 1,116 | 246 | 255 | 145 | 6,738 | 50.8 |
| 1942 | 7,242 | 1,116 | 109 | 8,467 | 886 | 164 | 749 | 325 | 6,343 | 47.9 |
| 1943 | 8,109 | 894 | 86 | 9,089 | 943 | 127 | 1,586 | 504 | 5,929 | 45.7 |
| 1944 | 7,733 | 943 | 119 | 8,795 | 793 | 214 | 1,363 | 649 | 5,776 | 44.7 |
| 1945 | 6,791 | | | | | | | | | 40.5 |

General information on sources and methodology given at the end of Table 6.

1/ Net purchases of fats and oils by the Dept. of Agriculture for export were derived by adding changes in U.S.D.A. stocks to export and shipment data of the Dept. of Commerce (excluding commercial).

2/ Larger quantity of butter was sold by the U.S.D.A. to the Army than was purchased for export in 1944.

3/ Excludes stocks owned by the U.S.D.A. and the armed forces.

4/ Estimated by U.S.D.A.

5/ Margarine stocks calculated as residuals.

6/ This category represents fats and oils used in cooking and salad oils, in salad dressing, mayonnaise, in bakery products and in minor uses such as fish canning. Stocks and foreign trade figures include data on edible fats and oils. Exports include edible linseed oil and mayonnaise where available.

General information on sources and methodology given at the end of Table 6.

Table 6, Part 5.- Fruits: Supply and distribution, 1935-39 average and 1940-45.

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agric. net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Pounds |
| **A. Citrus fruits for fresh consumption (approx. calendar year 1/)** | | | | | | | | | | |
| Average 1935-39 | 6,870 | | 25 | 6,895 | | 562 | | | 6,333 | 48.3 |
| 1940 | 7,908 | | 21 | 7,929 | | 445 | | | 7,484 | 56.3 |
| 1941 | 8,167 | | 19 | 8,186 | | 474 | | 143 | 7,569 | 57.1 |
| 1942 | 8,333 | | 7 | 8,340 | | 493 | | 305 | 7,542 | 57.0 |
| 1943 | 8,838 | | 8 | 8,846 | | 537 | | 582 | 7,727 | 59.5 |
| 1944 | 10,095 | | 9 | 10,104 | | 690 | | 621 | 8,793 | 68.0 |
| 1945 | 9,918 | | | | | | | | | 65.3 |
| **B. Apples, commercial for fresh consumption (calendar year) 2/** | | | | | | | | | | |
| Average 1935-39 | 4,384 | 1,312 | 1 | 5,697 | 1,307 | 475 | | | 3,915 | 30.2 |
| 1940 | 4,055 | 1,258 | 29 | 5,342 | 1,375 | 75 | | | 3,392 | 29.3 |
| 1941 | 4,110 | 1,375 | 4 | 5,489 | 1,237 | 58 | 9 | 85 | 4,100 | 30.3 |
| 1942 | 4,052 | 1,237 | 20 | 5,309 | 1,468 | 44 | 12 | 257 | 3,528 | 26.1 |
| 1943 | 3,107 | 1,468 | 15 | 4,590 | 1,000 | 19 | -- | 325 | 3,246 | 25.0 |
| 1944 | 4,181 | 1,000 | 82 | 5,263 | 1,569 | 23 | 5 | 235 | 3,431 | 26.5 |
| 1945 | 2,640 | | | | | | | | | 23.3 |
| **C. Other fruits for fresh consumption (calendar years) 3/** | | | | | | | | | | |
| Average 1935-39 | 4,807 | 75 | 3,101 | 7,983 | 75 | 222 | | | 7,686 | 59.2 |
| 1940 | 4,930 | 55 | 2,769 | 7,754 | 51 | 116 | | | 7,587 | 57.1 |
| 1941 | 5,342 | 51 | 2,725 | 8,118 | 63 | 120 | | 57 | 7,878 | 59.4 |
| 1942 | 4,896 | 63 | 1,432 | 6,391 | 73 | 89 | | 130 | 6,099 | 46.1 |
| 1943 | 3,568 | 73 | 1,313 | 4,954 | 36 | | | 133 | 4,696 | 36.2 |
| 1944 | 5,053 | 36 | 1,683 | 6,772 | 72 | | | 121 | 6,499 | 50.3 |
| 1945 | 5,187 | | | | | | | | | 54.8 |

Continued

General information on sources and methodology given at the end of table 6.

Table 6, Part 5.- Fruits: Supply and distribution, 1935-39 average and 1940-45
Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| | | | | D. Total fresh fruits (calendar years) | | | | | | |
| Average 1935-39 | 16,061 | 1,387 | 3,127 | 20,575 | 1,382 | 1,259 | | | 17,934 | 138.2 |
| 1940 | 16,893 | 1,313 | 2,819 | 21,025 | 1,426 | 636 | | | 18,963 | 142.7 |
| 1941 | 17,619 | 1,426 | 2,748 | 21,793 | 1,300 | 652 | 9 | 285 | 19,547 | 147.4 |
| 1942 | 17,281 | 1,300 | 1,463 | 20,040 | 1,541 | 626 | 12 | 692 | 17,169 | 129.8 |
| 1943 | 15,513 | 1,541 | 1,336 | 18,390 | 1,036 | 645 | - | 1,040 | 15,669 | 120.9 |
| 1944 | 19,329 | 1,036 | 1,774 | 22,139 | 1,641 | 793 | 5 | 977 | 18,723 | 144.8 |
| 1945 | 17,745 | | | | | | | | | 144.0 |
| | | | | E. Canned Fruits (pack years) 4/ | | | | | | |
| Average 1935-39 | 1,666 | 253 | 590 | 2,509 | 261 | 309 | | | 1,939 | 14.9 |
| 1940 | 1,738 | 223 | 569 | 2,530 | 136 | 69 | | | 2,325 | 17.5 |
| 1941 | 2,305 | 218 | 556 | 3,079 | 5/214 | 37 | 44 | 244 | 2,540 | 19.1 |
| 1942 | 2,226 | 5/1,003 | 535 | 3,764 | 587 | 27 | 122 | 894 | 2,134 | 16.3 |
| 1943 | 1,587 | 587 | 583 | 2,757 | 358 | 17 | 70 | 732 | 1,580 | 12.2 |
| 1944 | 2,100 | 358 | 455 | 2,913 | 284 | 14 | 125 | 1,242 | 1,248 | 9.6 |
| 1945 | 2,061 | | | | | | | | | 9.4 |

Continued -

General information on sources and methodology given at the end of table 6.

Table 6, Part 5.- Fruits: Supply and distribution, 1935-39 average and 1940-45
Continued

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| | | | | F. Canned Fruit juices (calendar years) 6/ | | | | | | |
| Average 1935-39 | 321 | 11 | 233 | 565 | 14 | 19 | | | 532 | 4.1 |
| 1940 | 620 | 13 | 354 | 987 | 7 | 34 | | | 946 | 7.1 |
| 1941 | 908 | 117 | 416 | 1,441 | 7/ 194 | 56 | 10 | 56 | 1,125 | 8.5 |
| 1942 | 859 | 7/ 406 | 272 | 1,537 | 250 | 56 | 85 | 192 | 954 | 7.2 |
| 1943 | 1,390 | 250 | 289 | 1,929 | 340 | 31 | 334 | 362 | 862 | 6.6 |
| 1944 | 1,606 | 340 | 259 | 2,205 | 301 | 49 | 127 | 426 | 1,302 | 10.1 |
| 1945 | 1,722 | | | | | | | | | 10.3 |
| | | | | G. Frozen Fruits, commercial pack (calendar years) 8/ | | | | | | |
| Average 1935-39 | 106 | 93 | | 199 | 106 | | | | 93 | .7 |
| 1940 | 172 | 128 | | 300 | 142 | | | | 158 | 1.2 |
| 1941 | 208 | 142 | 4 | 354 | 178 | | | | 176 | 1.3 |
| 1942 | 221 | 178 | 3 | 402 | 188 | | | 6 | 208 | 1.6 |
| 1943 | 221 | 188 | 4 | 413 | 227 | | | 13 | 173 | 1.3 |
| 1944 | 330 | 227 | 4 | 561 | 268 | | | 42 | 251 | 1.9 |
| 1945 | 320 | | | | | | | | | 2.2 |
| | | | | H. Dried Fruits - to be published later. | | | | | | |

Footnotes given at end of part 6.

General information on sources and methodology given at the end of Table 6.

Table 6, Part 6.— Vegetables: Supply and distribution, 1935-39 average and 1940-45

| Year | Supply: Production: Commercial 1/ | Supply: Production: Total 2/ | Supply: Stocks beginning of period | Supply: Imports and shipments | Supply: Total supply | Distribution: Shrinkage and waste 3/ | Distribution: Commercial exports and shipments | Distribution: Stocks end of period | Domestic Disappearance: Military | Domestic Disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| **A. Fresh vegetables (calendar years)** | | | | | | | | | | | |
| Average 1935-39 | 12,449 | 30,498 | 472 | 236 | 31,206 | 133 | 113 | 481 | | 30,479 | 235. |
| 1940 | 13,268 | 31,862 | 512 | 236 | 32,610 | 154 | 130 | 534 | | 31,792 | 239. |
| 1941 | 12,891 | 32,183 | 534 | 310 | 33,027 | 119 | 130 | 462 | 404 | 31,912 | 241. |
| 1942 | 13,223 | 34,161 | 462 | 324 | 34,947 | 153 | 123 | 533 | 974 | 33,164 | 251. |
| 1943 | 12,683 | 31,665 | 533 | 429 | 32,627 | 76 | 97 | 338 | 1,494 | 30,622 | 236. |
| 1944 | 14,638 | 34,224 | 338 | 392 | 34,954 | 198 | 150 | 588 | 1,204 | 32,814 | 254. |
| 1945 | 14,880 | 34,466 | | | | | | | | | 257. |

| Year | Supply: Pack 4/ | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total Supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for exports | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| **B. Canned Vegetables, commercial pack (pack year) 4/** | | | | | | | | | | |
| Average 1935-39 | 4,084 | 388 | 67 | 4,539 | 437 | 55 | | | 4,047 | 31.1 |
| 1940 | 4,584 | 346 | 2 | 4,932 | 178 | 80 | | | 4,674 | 35.2 |
| 1941 | 5,824 | 178 | 11 | 6,013 | 299 | 105 | 113 | 361 | 5,135 | 38.6 |
| 1942 | 6,830 | 5/1,413 | 6 | 8,249 | 1,066 | 60 | 311 | 1,757 | 5,055 | 38.7 |
| 1943 | 6,236 | 6/1,066 | 4 | 7,306 | 1,055 | 53 | 86 | 1,750 | 4,362 | 33.7 |
| 1944 | 6,343 | 1,055 | 4 | 7,402 | 747 | 55 | 88 | 2,127 | 4,385 | 33.9 |
| 1945 | 6,380 | | | | | | | | | 29-31 |

General information on sources and methodology given at the end of table 6.

(Continued)

Table 6, Part 6.- Vegetables: Supply and distribution, 1935-39 average and 1940-45 - Continued

| Year | Supply: Pack 7/ | Supply: Stocks beginning of period 8/ | Supply: Total supply | Distribution: Stocks end of period 8/ | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| | C. Frozen vegetables, net frozen weight (calendar years) 9/ | | | | | | |
| Average 1935-39 | 78.3 | 34.6 | 112.9 | 55.8 | | 57.1 | .44 |
| 1940 | 83.3 | 72.4 | 155.7 | 78.5 | | 77.2 | .58 |
| 1941 | 107.2 | 78.5 | 185.7 | 92.9 | 1.0 | 91.8 | .69 |
| 1942 | 163.4 | 92.9 | 256.3 | 103.3 | 15.0 | 138.0 | 1.04 |
| 1943 | 223.3 | 103.3 | 326.6 | 185.8 | 52.0 | 88.8 | .69 |
| 1944 | 235.6 | 185.8 | 421.4 | 163.0 | 50.3 | 208.1 | 1.61 |
| 1945 | 259.0 | | | | | | 1.54 |

| Year | Supply: Production | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Seed 10/ | Distribution: Com'l exports and shipments | Distribution: Dept. of Agri. net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil. lb. | Mil.lb. | Mil.lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| | D. Dry edible beans, cleaned (crop year) | | | | | | | | | | |
| Average 1935-39 | 1,361 | 176 | 29 | 1,566 | 222 | 128 | 68 | | | 1,148 | 8.8 |
| 1940 | 1,573 | 345 | 22 | 1,940 | 350 | 145 | 142 | 79 | 20 | 1,204 | 9.1 |
| 1941 | 1,705 | 270 | 16 | 1,991 | 311 | 147 | 43 | 257 | 77 | 1,156 | 8.7 |
| 1942 | 1,755 | 311 | 45 | 2,111 | 113 | 178 | 54 | 378 | 250 | 1,138 | 8.7 |
| 1943 | 1,935 | 113 | 151 | 2,199 | 86 | 160 | 36 | 12/ 453 | 350 | 1,089 | 8.4 |
| 1944 | 1,502 | 86 | 30 | 1,618 | 70 | 150 | 30 | 13/-145 | 420 | 1,093 | 8.4 |
| 1945 | 1,400 | | | | | | | | | | 7.2 |

Continued -

General information on sources and methodology given at the end of Table 6.

Table 6, Part 6.- Vegetables: Supply and distribution, 1935-39 average and 1940-45 - Continued

| Year | Supply: Production | Supply: Imports | Supply: Total supply | Distribution: Feed and waste | Distribution: Seed | Distribution: Used for processing: Starch | Distribution: Used for processing: Canned | Distribution: Used for processing: Dehydrated | Distribution: Used for processing: Dept. of Agri. net purchases | Distribution: Military | Distribution: Commercial exports and shipments | Distribution: Dept. of Agri. net purchases for exports | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Mil. Bushels | Pounds |
| **E. Potatoes (July year)** | | | | | | | | | | | | | | | |
| Average 1935-39 | 358.7 | 1.2 | 359.9 | 27.2 | 43.3 | 2.5 | | | | | 3.4 | | | 283.5 | 130 |
| 1940 | 370.7 | 1.0 | 371.7 | 28.9 | 40.8 | 8.0 | | | | | 4.3 | | | 289.7 | 131 |
| 1941 | 364.6 | .6 | 365.2 | 27.0 | 43.4 | 4.9 | .6 | | | 5.3 | 4.2 | | 4.4 | 275.4 | 124 |
| 1942 | 371.5 | 1.1 | 372.6 | 23.6 | 50.6 | 3.3 | .7 | .2 | | 8.1 | 1.5 | .3 | 26.9 | 257.4 | 118 |
| 1943 | 460.0 | 1.5 | 461.5 | 61.7 | 46.0 | 10.0 | 2.3 | 3.6 | | 17.1 | 3.2 | .4 | 29.9 | 287.3 | 133 |
| 1944 | 386.4 | 8.3 | 394.7 | 22.8 | 44.5 | 3.5 | .4 | 5.0 | | 18.0 | 2.9 | .1 | 33.7 | 263.8 | 122 |
| 1945 | 405.0 | | | | | | | | | | | | | | 124 |
| **F. Sweet potatoes (July year)** | | | | | | | | | | | | | | | |
| Average 1935-39 | 67.9 | | 67.9 | 11/6.7 | 11/6.1 | | | | | | | | | 55.1 | 23.3 |
| 1940 | 52.2 | | 52.2 | 11/4.4 | 11/5.5 | | | | | | | | | 42.3 | 17.5 |
| 1941 | 62.1 | | 62.1 | 11/5.0 | 11/5.2 | | 1.2 | | | | | | .8 | 49.9 | 20.6 |
| 1942 | 65.5 | | 65.5 | 12.5 | 4.0 | | .5 | | | 1.0 | | | 1.0 | 46.5 | 19.6 |
| 1943 | 73.4 | | 73.4 | 16.0 | 3.1 | .1 | .9 | | | 1.3 | | | 1.2 | 50.8 | 21.6 |
| 1944 | 71.7 | | 71.7 | 14.7 | 2.8 | .1 | .9 | | | 1.9 | | | 1.0 | 50.3 | 21.4 |
| 1945 | 64.0 | | | | | | | | | | | | | | 18.6 |

General information on sources and methodology given at the end of table 6.

Continued

Table 6. Part 6. - Vegetables: Supply and distribution, 1935-39 average and 1940-45 - continued

| Year | Supply: Pack | Supply: Beginning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l exports and shipments for export | Distribution: Dept. of Agriculture purchases | Domestic disappearance: Military | Domestic disappearance: Civilian | Domestic disappearance: Civilian per capita | Canned soups and baby foods: Civilian | Canned soups and baby foods: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lbs. |
| | G. Canned soups, calendar years | | | | | | | | | | | |
| Average 1935-39 | 684.6 | 231.6 | --- | 916.2 | 268.8 | 7.0 | | | 640.4 | 4.9 | 677.6 | 5.2 |
| 1940 | 900.0 | 315.0 | --- | 1,215.0 | 303.0 | 9.7 | | | 902.3 | 6.8 | 998.3 | 7.5 |
| 1941 | 1,035.0 | 303.0 | --- | 1,338.0 | 405.0 | 14.3 | | | 918.7 | 6.9 | 1,014.7 | 7.6 |
| 1942 | 840.0 | 405.0 | --- | 1,245.0 | 258.0 | 13.9 | | 5.0 | 968.1 | 7.3 | 1,121.1 | 8.5 |
| 1943 | 675.0 | 258.0 | --- | 933.0 | 225.0 | 11.4 | .5 | 9.9 | 686.2 | 6.7 | 893.2 | 6.9 |
| 1944 | 890.1 | 226.8 | --- | 1,116.9 | 226.0 | 12.9 | 2.6 | 10.0 | 865.4 | 6.6 | 1,134.4 | 8.8 |
| 1945 | 885.0 | | | | | | | | | | | 9.4 |

| Year | Supply: Pack | Supply: Beginning commercial stocks | Supply: Imports | Supply: Total supply | Distribution: Ending commercial stocks | Distribution: Domestic Disappearance: Civilian | Distribution: Domestic Disappearance: Per chill under 3 |
|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lbs. |
| | H. Canned baby foods, calendar years | | | | | | |
| Average 1935-39 | 48 | 18 | --- | 66 | 29 | 37 | 6.1 |
| 1940 | 81 | 63 | --- | 144 | 48 | 96 | 15.3 |
| 1941 | 126 | 48 | --- | 174 | 78 | 96 | 14.8 |
| 1942 | 165 | 78 | --- | 243 | 90 | 153 | 22.4 |
| 1943 | 234 | 90 | --- | 324 | 117 | 207 | 27.4 |
| 1944 | 306 | 116 | --- | 422 | 153 | 269 | 33.9 |
| 1945 | 360 | | | | | | 44.5 |

General information on sources and methodology given at the end of table 6.

Continued

Footnotes: Table 6, Part 5.- Fruits:

1/ Calendar year prior to 1941; beginning in 1941 data are for the crop year beginning in October or November of the year prior to that designated. 2/ Commercial production sold and used in farm household. 3/ Includes apricots, avocados, bananas, cherries, cranberries, figs, grapes, peaches, pears, pineapples, plums and prunes, and strawberries. 4/ Includes apples, applesauce, apricots, berries, cherries (including brined), cranberries, figs, fruit cocktail, grapefruit segments, olives (including brined), pineapples, plums, prunes, peaches, and pears. 5/ Stocks include only packers' holdings through 1941-42 but are more complete in 1941-42 than in previous years; stocks since 1941-42 also include wholesalers' holdings. Data from reports to Department of Commerce. 6/ Includes grapefruit, oranges, blended citrus, and lemon juices (single strength juices 1935-45; concentrated juices converted to single strength basis 1941-45), pineapple, apple, grape and prune juices and fruit nectars. Citrus on basis of year beginning in November of year prior to that designated. Other juices on a calendar year basis. 7/ Stocks prior to 1942 include only packers' holdings but are more complete for 1941 than for earlier years: stocks for 1942 and subsequent years include packers' and wholesalers' holdings, as reported to the Department of Commerce. 8/ Production excludes some quantities processed by industrial users. Consumption includes that part of the commercial pack used indirectly (ice cream manufacturers, preservers, etc.) as well as that consumed directly as fruit.

Footnotes: Table 6, Part 6.- Vegetables:

1/ Official estimates of commercial production for fresh market shipment, less small quantities not marketed and less estimated quantities processed. The latter deduction was made from some crops for which no official estimate of the processing crop is made or where the quantity actually processed exceeded such official estimates. 2/ Total production includes officially reported production of 25 truck crops for fresh market shipment (Crop Reporting Board) plus rough estimates of other vegetable production including unreported commercial truck crops, market gardens for fresh sale and farm gardens for home use. 3/ Onions only. 4/ Data include asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut, and pickles (including bulk converted to canned basis) peas, pimientos, Irish potatoes, sweetpotatoes, pumpkins and squash, spinach, other greens, tomatoes, tomato catsup and chili sauce, tomato juice, tomato paste, tomato pulp and puree, tomato sauce, and mixed vegetables (a mixture of two or more vegetables). 5/ Includes packers' and wholesalers' stocks beginning 1942; previous data include packers' stocks only. Data from Department of Commerce. 6/ Includes combination juices such as V-8 cocktail beginning 1943. 7/ Pack, 1937 through 1942 compiled from Western Canner and Packer; beginning 1943 data are estimates of the Federal Interdepartmental Supply Estimates Committee. 8/ Stock data from Cold Storage Reports of the Department of Agriculture. 9/ Vegetables consist of asparagus, snap beans, lima beans, broccoli, brussels sprouts, cauliflower, corn-cut, corn-on-cob, peas, peas and carrots (mixed), rhubarb, spinach, squash, and miscellaneous. 10/ Estimated quantity required to plant acreage of the dry and fresh snap and lima bean crop for commercial market, processing, market gardens, farm gardens, and city gardens. 11/ Data are not comparable with revised data for years 1942-44. Data for earlier years still in process of revision. 12/ Excluding estimated loss in storage of 25 million pounds of garbanzos. 13/ Sales to army greater than purchases for export.

Table 6, Part 7.- Sugar, raw value: Supply and distribution, calendar years, 1935-39 average and 1940-45

| Year | Supply: Production 1/ | Supply: Stocks beginning of period 1/ 2/ | Supply: Receipts from Foreign sources | Supply: Receipts from Territories | Supply: Total supply | Distribution: Commercial exports and shipments 3/ | Distribution: Dept. of Agri. net purchases for exports | Distribution: Stocks end of period 1/ 2/ | Domestic disappearance: Military | Domestic disappearance: Civilian | Domestic disappearance: Civilian per capita (refined) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | 1,000 short tons | Pounds |
| Average 1935-39 | 1,948 | 4/ 2,678 | 3,013 | 1,849 | 9,493 | 109 | | 2,684 | | 6,700 | 96.5 |
| 1940 | 2,104 | 3,221 | 3,006 | 1,855 | 10,186 | 195 | | 3,228 | | 6,753 | 95.2 |
| 1941 | 2,090 | 3,228 | 3,997 | 1,851 | 11,166 | 94 | --- | 3,627 | 95 | 7,350 | 103.6 |
| 1942 | 2,141 | 3,627 | 1,927 | 1,607 | 9,302 | 55 | 184 | 2,537 | 424 | 6,102 | 86.2 |
| 1943 | 1,531 | 2,537 | 3,432 | 1,511 | 9,011 | 18 | 474 | 2,221 | 730 | 5,558 | 80.3 |
| 1944 | 1,512 | 2,221 | 3,928 | 1,548 | 9,209 | 24 | 317 | 1,696 | 1,014 | 6,158 | 89.0 |
| 1945 | 1,950 | | | | | | | | | | 72.1 |

1/ Data from Sugar Branch, OMS, Dept. of Agriculture.
2/ Includes invisible stocks in the hands of manufacturets, wholesalers, and retailers from 1935 to date.
3/ Includes sugar used in the manufacturers of other commodities for export; 1942, 1943, 1944 delivered for export. Data through 1942 from Dept. of Commerce, thereafter estimates Dept. of Agriculture.
4/ 1935-38 data exclude mainland cane stocks.
General information on sources and methodology given at the end of table 6.

Table 6 Part 8.- Grains: Supply and distritubion, 1935-39 average and 1940-45

| Year | Supply: Production | Supply: Stocks beginning of period 1/ | Supply: Imports | Supply: Total supply | Distribution: Ending stocks 1/ | Distribution: Commercial exports, shipments, and D.A. shipments | Distribution: Domestic disappearance: Other than food 2/ | Distribution: Domestic disappearance: Military food, including relief | Distribution: Domestic disappearance: Civilian food | Distribution: Civilian food per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Mil. bu. | Lb. |
| | | | | A. Wheat (calendar years) | | | | | | |
| Average 1935-39 | 759 | 482 | 15 | 1,256 | 517 | 54 | 209 | | 476 | 220 |
| 1940 | 813 | 606 | --- | 1,419 | 724 | 37 | 189 | | 469 | 212 |
| 1941 | 943 | 724 | 6 | 1,673 | 1,001 | 36 | 150 | 2 | 484 | 219 |
| 1942 | 974 | 1,001 | 1 | 1,976 | 1,158 | 26 | 282 | 16 | 494 | 224 |
| 1943 | 841 | 1,158 | 49 | 2,048 | 818 | 1/59 | 636 | 35 | 500 | 232 |
| 1944 | 1,079 | 818 | 125 | 2,022 | 836 | 2/36 | 579 | 74 | 497 | 231 |
| 1945 | 1,129 | | | | | | | | | 234 |
| | | | | B. Rye (calendar years) | | | | | | |
| Average 1935-39 | 44.9 | 29.5 | 2.8 | 77.2 | 32.4 | 1.5 | 36.0 | | 7.3 | 3.2 |
| 1940 | 40.0 | 34.1 | --- | 74.1 | 33.4 | 0.9 | 31.6 | | 8.2 | 3.5 |
| 1941 | 45.4 | 33.4 | 9.9 | 88.7 | 44.2 | --- | 36.8 | --- | 7.7 | 3.3 |
| 1942 | 57.7 | 44.2 | 0.4 | 102.3 | 57.0 | --- | 36.3 | --- | 9.0 | 3.8 |
| 1943 | 30.5 | 57.0 | 2.0 | 89.5 | 37.1 | --- | 41.6 | --- | 10.8 | 4.7 |
| 1944 | 25.9 | 37.1 | 10.8 | 73.8 | 24.5 | --- | 40.0 | --- | 9.3 | 4.0 |
| 1945 | 27.3 | | | | | | | | | |

General information on sources and methodology given at the end of table 6.

Continued

Table 6 Part 8.- Grains: Supply and distribution, 1935-45 - Continued

| Year | Supply | | | | Distribution | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Production for marketing year 3/ | Stocks beginning of period | Imports | Total supply | Ending stocks | Commercial exports shipments and Dept. Ag. shipments | Domestic disappearance: Other than food 2/ | Domestic disappearance: Military food, including relief | Domestic disappearance: Civilian food | Civilian food per capita |
| | Mil. bu. | Mil. bu. | Mil.bu. | Mil.bu. | Mil.bu. | Mil. bu. | Mil.bu. | Mil.bu. | Mil.bu. | Lb. (milled) |
| | C. Rice rough, (Marketing year) | | | | | | | | | |
| Average 1935-39 | 46.8 | 4.5 | .6 | 51.9 | 4.9 | 17.8 | 3.9 | | 25.3 | 5.7 |
| 1940 | 54.1 | 8.1 | .4 | 62.6 | 9.5 | 22.4 | 2.0 | | 28.7 | 6.2 |
| 1941 | 54.4 | 9.5 | .4 | 64.3 | 6.0 | 26.1 | 4.2 | | 28.0 | 6.2 |
| 1942 | 51.3 | 6.0 | .2 | 57.5 | 0.8 | 26.1 | 3.1 | --- | 27.5 | 5.9 |
| 1943 | 64.5 | 0.8 | — | 65.3 | 5.4 | 25.8 | 3.5 | 2.4 | 28.2 | 6.3 |
| 1944 | 64.8 | 5.4 | .1 | 70.3 | 5.4 | 26.9 | 6.4 | 4.0 | 27.6 | 6.7 |
| 1945 | 70.2 | | | | | | | | | 5.7 |

1/ Rye stock data exclude stocks held at interior mills, elevators and warehouses.
2/ Other includes feed, seed, alcohol, industrial uses and minor adjustment factor.
3/ Most of production in previous year marketed in year indicated, e.g. 1944 crop 70.2 million bushels marketed in 1945.

General information on sources and methodology given at the end of table 6.

Table 6 Part 9.- Beverages: Supply and distribution, calendar years, 1935-39 average and 1940-45

| Year | Supply: Stocks beginning of period | Supply: Imports 1/ | Supply: Total supply | Distribution: Stocks end of period 2/ | Distribution: Commercial exports and shipments | Distribution: Department of Agriculture Shipments | Apparent disappearance: Military | Apparent disappearance: Civilian | Apparent disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| **A. Coffee (Green bean basis)** | | | | | | | | | |
| Average 1935-39 | 2/ 105 | 1,843 | 1,948 | 118 | 10 | | | 1,820 | 14.0 |
| 1940 | 2/ 160 | 2,061 | 2,221 | 153 | 11 | | | 2,057 | 15.5 |
| 1941 | 1/ 453 | 2,255 | 2,708 | 551 | 5 | --- | 92 | 2,060 | 15.5 |
| 1942 | 3/ 551 | 1,715 | 2,266 | 206 | 15 | 1 | 267 | 1,777 | 13.4 |
| 1943 | 3/ 206 | 2,287 | 2,493 | 466 | 9 | 1 | 320 | 1,691 | 13.0 |
| 1944 | 3/ 466 | 4/ 2,608 | 3,074 | 550 | 18 | 7 | 451 | 2,048 | 15.8 |
| 1945 | | | | | | | | | 16.7 |
| **B. Tea** | | | | | | | | | |
| Average 1935-39 | 1/ 39 | 88 | 127 | 40 | | | | 87 | .67 |
| 1940 | 1/ 42 | 97 | 139 | 51 | | | | 88 | .66 |
| 1941 | 1/ 51 | 107 | 158 | 49 | 5 | --- | --- | 104 | .78 |
| 1942 | 1/ 49 | 49 | 98 | 22 | --- | --- | 6 | 70 | .53 |
| 1943 | 1/ 22 | 89 | 111 | 33 | 2 | 1 | 15 | 60 | .46 |
| 1944 | 4/ 29 | 4/ 90 | 119 | 43 | 2 | --- | 6 | 68 | .53 |
| 1945 | | | | | | | | | .66 |
| **C. Cocoa beans** | | | | | | | | | |
| Average 1935-39 | 1/ 122 | 576 | 698 | 129 | | | | 569 | 4.4 |
| 1940 | 1/ 160 | 679 | 839 | 194 | | | | 645 | 4.9 |
| 1941 | 2/ 548 | 693 | 1,241 | 566 | 38 | | --- | 637 | 4.8 |
| 1942 | 4/ 566 | 239 | 805 | 211 | 15 | | 76 | 503 | 3.8 |
| 1943 | 4/ 211 | 564 | 775 | 231 | 8 | | 164 | 372 | 2.9 |
| 1944 | 4/ 231 | 692 | 923 | 234 | 30 | | 195 | 464 | 3.6 |
| 1945 | | | | | | | | | 3.6 |

1/ From Department of Commerce. 2/ Incomplete stock series for coffee and cocoa beans from trade journals.
3/ From Office of Price Administration. 4/ From Department of Agriculture.

General information on sources and methodology given at the end of Table 6.

General information on sources and methodology:

a) Complete 1945 data cannot be published for security reasons. All data for 1942-45 are preliminary.

b) Production estimates made by or in cooperation with the Bureau of Agricultural Economics, except where noted.

c) Data on imports and commercial exports and shipments are from the Department of Commerce, except where noted. Commercial exports and shipments exclude all quantities procured by the Department of Agriculture for lend-lease, Red Cross, or for paying governments.

d) Data on net purchases of the Department of Agriculture for export were derived by adding changes in U. S. Department of Agriculture stocks (not available for publication) to Department of Agriculture shipments, except in the case of fats and oils including butter where Department of Commerce data on exports and shipments were used throughout. The net purchase data represent net takings from current production. They could also be derived by subtracting resales to the trade, to the armed forces and quantities used for special civilian programs from the procurement data of the Department of Agriculture.

e) Military data are total military procurement, including purchases from the Department of Agriculture and quantities used for civilian relief feeding; data taken from reports by the armed services to the Department of Agriculture.

f) Except where noted, stock data are from cold storage and other stock reports of the Department of Agriculture. Adjustments have been made to exclude Government owned stocks wherever possible.

Table 7.- Retail food prices and total cost of living, United States, by months, 1943-45

(Index numbers 1935-39 = 100)

| Year and month | Meats | Eggs | Dairy products | Fats and oils | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and sweets | Beverages | All foods | Total cost of living |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| Jan. | 135 | 166 | 134 | 126 | 106 | 147 | 129 | 154 | 127 | 124 | 133 | 121 |
| Feb. | 136 | 144 | 136 | 126 | 106 | 153 | 131 | 156 | 127 | 125 | 134 | 121 |
| Mar. | 137 | 142 | 137 | 126 | 107 | 173 | 132 | 157 | 128 | 125 | 137 | 123 |
| Apr. | 138 | 141 | 137 | 127 | 108 | 191 | 132 | 158 | 128 | 125 | 141 | 124 |
| May | 138 | 142 | 137 | 126 | 108 | 206 | 131 | 158 | 128 | 124 | 143 | 125 |
| June | 138 | 146 | 134 | 126 | 108 | 202 | 130 | 158 | 126 | 124 | 142 | 125 |
| July | 131 | 154 | 133 | 126 | 108 | 193 | 130 | 159 | 126 | 124 | 139 | 124 |
| Aug. | 130 | 167 | 133 | 126 | 108 | 179 | 130 | 160 | 127 | 125 | 137 | 123 |
| Sept. | 130 | 178 | 134 | 126 | 108 | 176 | 130 | 160 | 127 | 125 | 137 | 124 |
| Oct. | 131 | 190 | 134 | 126 | 108 | 175 | 130 | 162 | 127 | 125 | 138 | 124 |
| Nov. | 130 | 191 | 134 | 125 | 108 | 170 | 130 | 162 | 127 | 125 | 137 | 124 |
| Dec. | 131 | 181 | 134 | 124 | 108 | 172 | 130 | 162 | 127 | 125 | 137 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Jan. | 131 | 154 | 134 | 124 | 108 | 175 | 130 | 163 | 127 | 124 | 136 | 124 |
| Feb. | 130 | 143 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Mar. | 131 | 135 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Apr. | 130 | 128 | 134 | 124 | 108 | 178 | 130 | 163 | 127 | 124 | 135 | 125 |
| May | 130 | 127 | 134 | 123 | 108 | 183 | 129 | 164 | 126 | 124 | 136 | 125 |
| June | 130 | 129 | 134 | 123 | 108 | 185 | 129 | 164 | 126 | 124 | 136 | 125 |
| July | 129 | 149 | 134 | 123 | 109 | 188 | 129 | 165 | 127 | 124 | 137 | 126 |
| Aug. | 129 | 159 | 134 | 123 | 108 | 187 | 129 | 165 | 126 | 124 | 138 | 126 |
| Sept. | 129 | 158 | 134 | 123 | 109 | 179 | 129 | 165 | 126 | 124 | 137 | 126 |
| Oct. | 129 | 179 | 134 | 123 | 109 | 170 | 130 | 166 | 126 | 124 | 136 | 126 |
| Nov. | 130 | 187 | 134 | 123 | 109 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Dec. | 130 | 188 | 134 | 123 | 109 | 164 | 130 | 166 | 126 | 124 | 137 | 127 |
| 1945 | | | | | | | | | | | | 127 |
| Jan. | 130 | 170 | 134 | 123 | 109 | 178 | 130 | 167 | 126 | 124 | 137 | 127 |
| Feb. | 131 | 153 | 134 | 124 | 109 | 178 | 130 | 167 | 126 | 124 | 136 | 127 |
| Mar. | 131 | 141 | 134 | 124 | 109 | 179 | 130 | 167 | 126 | 124 | 136 | 127 |
| April | 131 | 140 | 134 | 124 | 109 | 183 | 130 | 168 | 126 | 125 | 137 | 127 |
| May 1/ | 132 | 141 | 134 | 124 | 109 | 195 | 130 | 169 | 127 | 125 | 139 | 128 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/Preliminary.

1946 OUTLOOK ISSUE

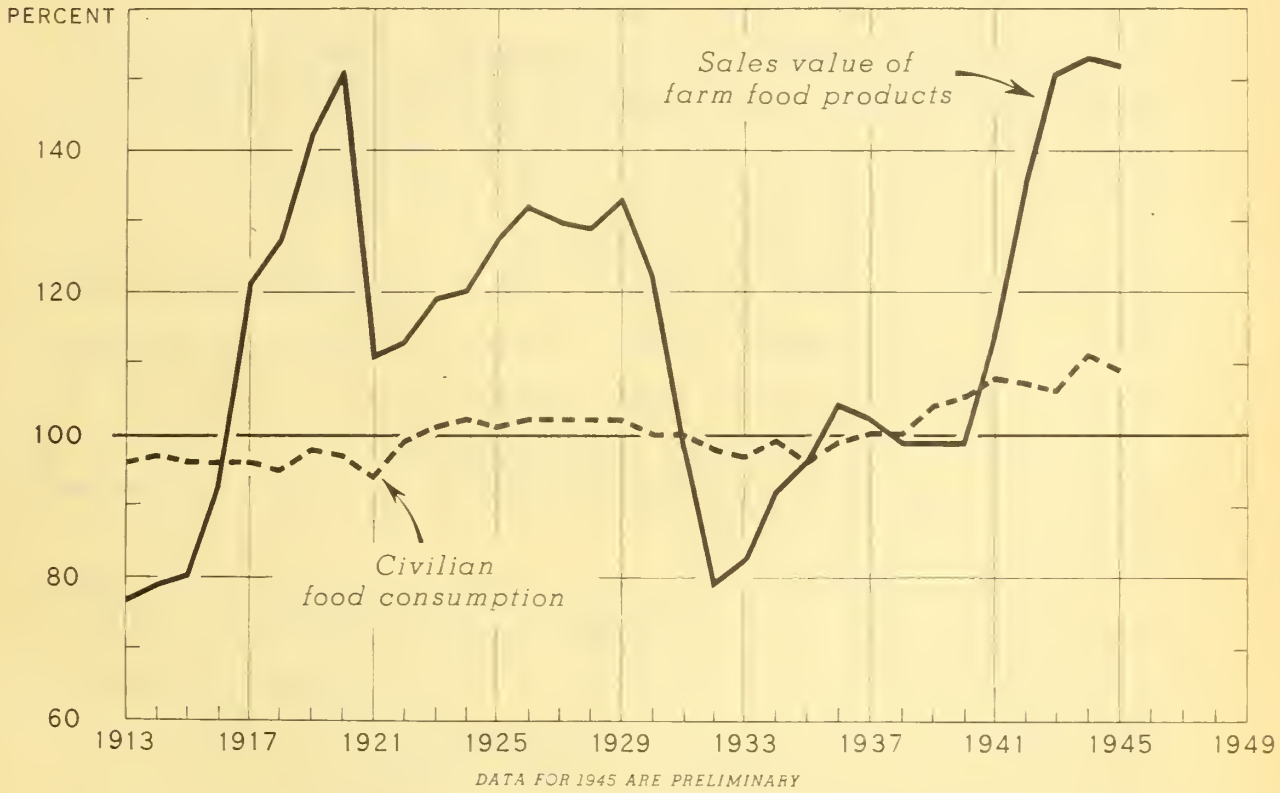
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 29 BAE OCTOBER 1945

## RETAIL SALES VALUE OF FARM FOOD PRODUCTS PER CAPITA AND CIVILIAN PER CAPITA FOOD CONSUMPTION, 1913-45

INDEX NUMBERS (1935-39=100)




U.S DEPARTMENT OF AGRICULTURE NEG 45640 BUREAU OF AGRICULTURAL ECONOMICS

The retail value, per person, of farm food products sold to civilian consumers has fluctuated widely between 1913 and 1945. Most of the fluctuation reflects changes in prices during periods of prosperity, depression, war and inflation; but part of it is due to changes in the volume of food consumption per capita.

LIBRARY
CURRENT SERIAL RECORD
☆ DEC 14 1945 ☆
U. S. DEPARTMENT OF AGRICULTURE

# THE NATIONAL FOOD SITUATION

## SUMMARY

Total food available for civilians in 1946 will be considerably greater than in 1945. Average food consumption per capita is also expected to be larger than in 1945, even with increases in civilian population resulting from demobilization of the armed forces. In fact, it may exceed the high record of 1944, which was 11 percent above the prewar level of 1935-39. All foods, however, will not be equally plentiful. At least in the early months of 1946, supplies of a number of foods will continue to be smaller than amounts consumers would be willing to purchase. These foods include pork, the better grades of beef and veal, fats and oils (particularly butter), sugar, and canned fish.

Most of the expected improvement in civilian food supplies next year stems from the sharp cutback in military food requirements, which will drop to 1/3 or even 1/4 of the 1945 level. Exports and shipments of food in 1946 will continue large, assuming that satisfactory financial arrangements are completed. The greater part of these exports will move in the early months of the year, mainly to the United Kingdom and the liberated areas of Europe.

Plentiful supplies of most foods are in prospect for next year. More ice cream, cheese, condensed and evaporated milk, fluid cream, canned vegetables, and fresh and frozen fish will be available than in 1945. Eggs and fluid milk will continue plentiful although average consumption per person is likely to be somewhat smaller than this year's records. Consumption of chicken, turkey, fresh fruits and vegetables, frozen and dried fruits, potatoes and sweetpotatoes, and cereal products probably will average substantially the same next year as in 1945.

Civilian supplies of some meats and fats (other than butter) will be larger than before the war, but will not be sufficient at present prices

# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

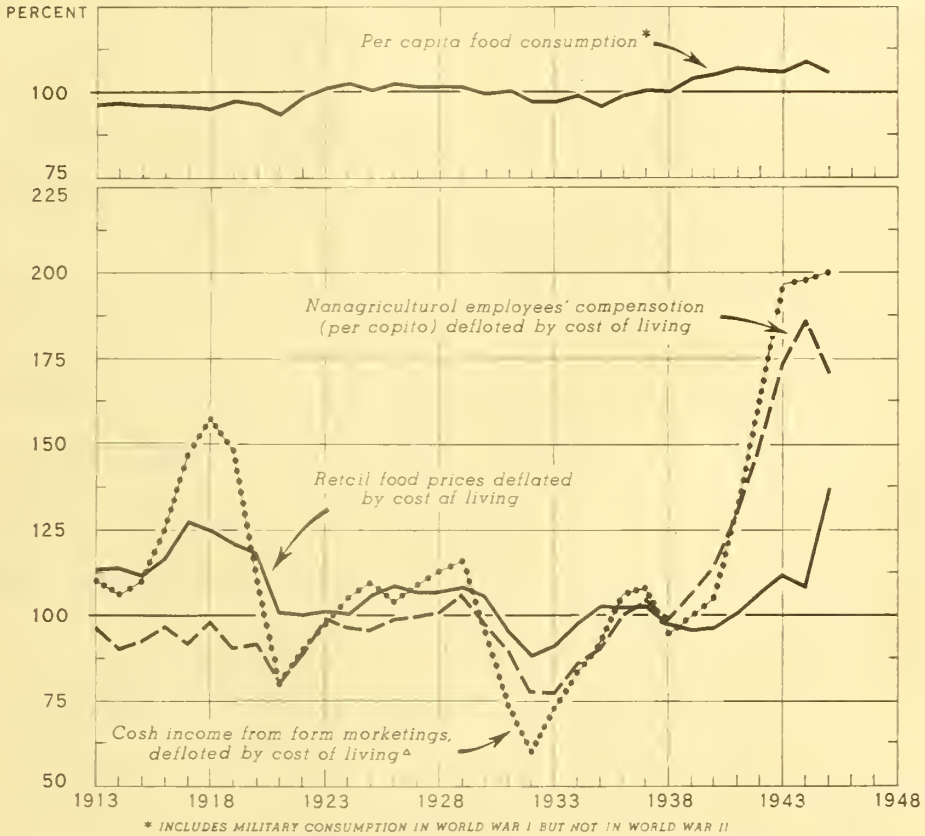
NFS - 28 BAE AUGUST - SEPTEMBER 1945

In this issue:
THE FOOD SITUATION IN CONTINENTAL EUROPE DURING THE WAR.

LIBRARY CURRENT ☆ OCT 9-1945 U.S. DEPARTMENT OF AGRICULTURE

PER CAPITA FOOD CONSUMPTION, RETAIL FOOD PRICES, NONAGRICULTURAL EMPLOYEES' COMPENSATION (PER CAPITA) AND CASH INCOME FROM FARM MARKETINGS, 1913-45

INDEX NUMBERS (1935-39=100)




* INCLUDES MILITARY CONSUMPTION IN WORLD WAR I BUT NOT IN WORLD WAR II
△ EXCLUDING GOVERNMENT PAYMENTS DATA FOR 1945 ARE TENTATIVE ESTIMATES

U. S. DEPARTMENT OF AGRICULTURE NEG. 45539 BUREAU OF AGRICULTURAL ECONOMICS

The index of per capita food consumption has not varied greatly since 1913, although it has reflected major changes in consumer income and food supplies. Wartime civilian consumption would have been much higher if war needs had not required so much of the food supply.

In contrast, farm and nonfarm incomes and food prices have fluctuated widely in the period 1913-45. During World War II, cash farm income has been unusually high as a result of large military and export demand (20 percent of total food disappearance) and strong demand from civilians. With prospective reductions in nonagricultural employees compensation, in purchases for military use and export, and in food prices, decreases in cash farm income can be expected. However, domestic demand for food probably will remain at a high level in relation to prewar years.

# THE NATIONAL FOOD SITUATION

In This Issue


| | Page |
|---|---|
| General Summary | 2 |
| Commodity Reviews | 4 |
| The Food Situation in Continental Europe During the War | 11 |
| Supply and Distribution of Dried Fruits, 1935-1944 | 16 |


## SUMMARY


The civilian food situation this fall and winter will be significantly easier than it has been so far in 1945, and prospective supplies of many foods for civilians will be larger than those available in the fall and winter of 1944.

The general improvement in the food outlook is primarily a result of the sudden end of the war. Procurement of food for the armed forces will be very much smaller from now on than it has been for the last two years. Civilian demand for some foods may taper off this winter as consumer incomes decline, but the general demand for food will still be high relative to supplies. In addition, a share of the food made available by military cutbacks will be shipped abroad, especially to liberated areas. This share is expected to include canned meats and some fresh and frozen meats (particularly lower grades of beef, which will be plentiful), some cheaper types of canned fish, canned and powdered milk, eggs, cheese, potatoes, some dry beans and peas, dried fruits, rice, some corn, and wheat. The United States can easily spare substantial quantities of these foods because good supplies of these and other commodities will be available for domestic civilian consumption.

This fall and winter, the domestic civilian supplies of meats, canned fish, canned fruits, fruit juices and vegetables, turkey, chicken, dried skim and dried whole milk, canned milk, fluid cream, and potatoes will be materially larger than those of recent months and much larger than in the same period last year. In fact, more potatoes, more eggs, and more of the lower grades of beef may be available than civilians will demand at present prices.

Some increases in supplies are expected for butter, cheese, pork, lower grades of beef, and veal. The heavy marketing season for livestock has begun and civilians will benefit from the increased output. Little change in lamb and mutton supplies for civilians is expected since non-civilian takings will be larger in the next few months.

A moderate improvement in the situation for most fats and oils will occur this fall and winter. The shortage of fats and oils results from the smaller pig crop this past spring as well as the world shortage of fats. The sugar situation will improve moderately in the spring if the Cuban crop turns out well, but no substantial increase in world supplies can be expected before early 1947 when there will have been opportunity for greater production in the Philippines. The present tight situation reflects the world shortage, including the short Cuban crop and the reduction in domestic and world stocks last year.

Civilian supplies of rice and dry beans and peas may be somewhat reduced from last year's supplies by substantial relief shipments but, with more plentiful supplies of other foods, should be adequate. This year's production of dry beans and peas will be smaller than in 1944. The apple crop is indicated to be the lowest on record.

Cereal products, except those requiring relatively large quantities of fats and sugar, fresh vegetables, citrus fruit, fresh and frozen fish, frozen fruits and vegetables, and fluid milk, will continue plentiful.

As the result of the changes in civilian supplies, the ration point values for canned supplies of fruits, fruit juices, vegetables, and milk, and for cheese, are now set at zero. The point value for margarine has been lowered slightly and those for butter and meats have been cut since the end of the war, on the average, about a fourth. No changes had been made in ration allowances for sugar, lard, shortening, and cooking and salad oils through mid-September. Set-asides for Government purchase have been suspended indefinitely or terminated on meats, chicken, butter, cheese, and powdered milk since it is expected that the reduced Government requirements can be obtained through open market purchases. Orders requiring some canned fruits and vegetables, canned fish, lard, and turkey to be set aside for Government purchase are still in effect.

-- September 18, 1945

## COMMODITY REVIEWS

### Meats

The sharp reduction in military procurement this fall and winter during the seasonal rise in output will materially increase both civilian meat supplies and supplies for export to liberated areas. Nevertheless, total meat supplies may not be large enough to meet full civilian demand at current prices plus important export needs during all of the period through next spring. According to present indications, civilian meat supplies will be substantially higher than in the first half of the year and may exceed an annual rate of 140 pounds per capita this winter.

Meat ration point values were lowered 25 to 30 percent, on the average, for the September ration period and were set at the lowest level in the last 6 months. Point values were reduced on meat of all types with the greatest reduction in beef and veal.

Because of the end of the war and sufficient stocks on hand, the Army will buy little more canned meat for some time. The heavy military procurement of fresh and frozen meats will continue for several months at least. The cutback in canned meat particularly affects the distribution of lower grades and cheaper cuts of beef. As the marketings of grass fat cattle

increase in the next few weeks, civilian supplies will become larger than in the same period of 1944, despite fairly large exports now expected. Prices of lower grades of beef may decline from ceilings. Even though the output of pork and lamb and mutton will increase in the last quarter of the year, military and export requirements probably will be so large as to keep civilian supplies below full demand at current prices and below the heavy rate of consumption in the last quarter of 1944. Prices of most classes of meat other than the lower grades of beef are likely to continue at ceiling levels at least through the first part of 1946.

On August 19 the orders requiring set-asides for Government purchase of beef and veal, hams, and bacon were suspended because of the decreased quantities to be purchased by the Government. Set-asides on all other pork cuts were suspended, effective September 2.

Slaughter quotas administered by the Office of Price Administration which restricted slaughter by non-federally inspected commercial plants and by farmers were suspended indefinitely on September 8. At the same time, Control Order No. 1 which required meat distributors to deliver about the same proportion of civilian meat to each county as they did in the first quarter of 1944, was suspended.

Lend-lease shipments of meat and meat products by the United States from the beginning of the program in 1941 through June 30, 1945, totaled 5.7 billion pounds, product weight, or about 8 billion pounds wholesale dressed weight. During the period April-June only 258 million pounds, product weight, were shipped. The United Kingdom, British Services, British Colonies and Dominions, and U.S.S.R. were the principal recipients. With the end of the lend-lease program, other financial arrangements are being made to continue through the winter at least the shipments of food to the United Kingdom and to the liberated areas of Europe. Because of the significant cutbacks in military procurement, U. S. meat supplies will be large enough to supply U. S. civilians at an annual rate of 140 pounds or so per capita this winter (compared with a 126-pound annual rate in 1935-39) and to ship over a billion pounds of meat in 1945-46 to bring European consumption above 65 percent of their pre-war average, if financial arrangements can be made.

Meat rationing was reinstituted in Canada on September 10 in order to distribute a 12-15 percent smaller civilian supply than the average 1944-45 rate of about 150 pounds per capita. The decrease in civilian supply results from increased shipments to the United Kingdom and liberated areas of Europe.

Fish

Military procurement from the new pack of canned fish may not be much more than half of the quantity scheduled before V-J day. This will materially increase the civilian supplies of canned salmon in particular. Probably, an important part of the cutback in certain other types of canned fish will be made available to liberated areas. The U. S. civilian supply of all canned fish per capita, may be somewhat larger than in 1944-45, but still below the pre-war average of about 5 pounds.

Supplies of fresh and frozen fish may be as large this winter as in pre-war years. Boats, manpower, and equipment are now available and all fishing areas are open.

Poultry and Eggs

The end of the war has resulted in increased supplies of eggs, especially in frozen form. The Army cancelled a large part of the dried egg contracts which required the use of frozen egg. Civilian supplies of lower grade eggs, in particular, will be plentiful at prices below ceilings, but supplies of higher grade eggs may still be short for the next few months in some markets, such as in the East.

Record supplies of turkey meat will be available for civilians this coming holiday season. Production of turkey meat in 1945 will be about 650 million pounds, 20 percent above 1944 and nearly double that of the pre-war average. Military procurement probably will be large, and WFO 106, which provides for the set-aside of all turkey processed in designated "turkey areas," continues in operation, as of September 18. Civilian consumption of turkey is expected to be over 4 pounds per person this year, an increase of 25 percen over 1944 and about 60 percent higher than in the pre-war years, 1935-39.

Supplies of chicken meat are increasing seasonally. For the next few months civilians will obtain more chicken meat than in the corresponding perio of 1944 because of reduction in procurement by the armed forces. War Food Order 119 relating to the set-aside in broiler areas has been terminated in North Carolina and suspended indefinitely in the Del-Mar-Va peninsula and othe areas because of the cutback in requirements of the armed forces. Under this order, the Army had been procuring from 5 to 7 million pounds of dressed poultry weekly in recent months. War Food Order 142 became effective August 1 and required the set-aside of 50 percent of the chicken meat slaughtered by "authorized processors" in 12 Midwestern States. It was terminated August 27. War Food Order 125, the set-aside of canned boned chicken and turkey, was suspended indefinitely as of July 31, and subsequent action terminated the order on August 27.

Dairy Products

The surrender of Japan has materially increased the over-all supplies of dairy products available to civilians. Supplies of whipping cream, somewhat larger quantities of fluid milk, light cream, cheese, and butter, and substantially larger supplies of canned milk will be on the market for civilian use, due to relaxations or terminations of various War Food Orders.

In view of increased civilian supplies of butter, cheese, and canned milk, the ration point value for butter was reduced from 16 to 12 points per pound, effective September 2. The canned milk point value was reduced to zero as of September 2 and point values on cheese were set at zero as of September 12.

All restrictions on sales of fluid milk and light cream were lifted, effective August 1, with the termination of WFO 79. That order went into effect in October 1943 in some markets. Effective September 1, wartime controls (WFO 8 and 13) on the sale of whipping cream and the use of butterfat in ice cream and other frozen dairy products were removed. The set-aside on butter (WFO 2) for Government purchase was terminated as of August 31. Suppli

of butter available for civilians in the last 4 months of 1945 will be larger than in the last 4 months of 1944 because only limited quantities will be purchased by the Government. However, the relaxation of controls over the use of butterfat in ice cream and sales of both heavy and light cream may result in some diversion of milk and butterfat from butter and cheese production. Restrictions on the sales of dried milk (WFO 93) were also lifted due to cancellation of Army contracts for purchase of dried whole milk. Purchases of evaporated milk by the Government were made under a voluntary set-aside. With the war at an end, there has been a substantial reduction in the procurement of evaporated milk by the armed forces, although exports to liberated areas may be increased.

Orders WFO 15 and 92, which affected the production and set-aside of cheeses were terminated, retroactive to September 1, 1945.

Fats and Oils

The end of the war has brought a moderate easing of the shortage of food fats and oils, as a result of a reduction in military procurement and termination of lend-lease. The ration point value of margarine was reduced from 14 points, where it had been for 2 months, to 12 points as of September 2. The point value for butter was also set at 12. All food fats and oils are now rationed at the same point value per pound for the first time.

Total factory and warehouse stocks of lard and rendered pork fat on August 1 this year were only 105 million pounds compared with 665 million pounds a year earlier. Total stocks of other food fats and oils were moderately smaller than a year earlier. Output of food fats and oils from domestic materials (including crude vegetable oils used chiefly for refining for food uses) in July 1945-June 1946 may be somewhat smaller than in 1944-45, as a result of reduced hog slaughter and of a decline in cottonseed production in 1945. Also, increased shipments of fats and oils to Europe from short world supplies may result in smaller imports of food fats into the United States in 1945-46 than in the year before.

Civilian supplies of butter are already greater. Purchases of butter by the armed forces have been substantially reduced, and creamery butter production was greater in July and August than in the same months of 1944 so the set-aside was taken off on August 31. Enough butter was accumulated during the spring and summer for the reduced military consumption now in prospect during the coming fall and winter. These reserves also will carry later into the spring than last season, when military procurement was resumed in February.

Military buying of food fats and oils other than butter probably will decline gradually and approximately in proportion to the number of men in the armed forces. This decline will have a relatively minor effect on the fats and oils situation, for even at the peak of military procurement, in early 1945, military purchases took only about 10 percent of the total production of food fats and oils other than butter.

Fruits

The important change in the outlook for civilian fruit supplies for this fall and winter is the considerable increase in canned fruit and fruit juice supplies resulting from the major reduction in military takings out of the new pack of commercially canned fruits and fruit juices. These were removed from rationing as of August 15. Civilians will have about as much canned fruit in 1945-46 as the 1935-39 average of 15 pounds per capita and more than 2 1/2 times as much canned fruit juices per person as was consumed in the prewar period. Canned fruit juice consumption per capita averaged 4 pounds in the years 1935-39. Canned peaches, pears and fruit cocktail probably will be plentiful as soon as the distribution of the new pack begins. Much more canned pineapple is forecast for the next 12 months than has been available to civilians during the war. After the first of the year, large supplies of canned citrus will be marketed from the new pack and canned citrus juices will be more plentiful! Pineapple juice will become generally available within the next few months.

With the exception of apples, supplies of most fresh fruits will be as large or larger than last fall and winter with large crops of pears, grapes, cranberries, and citrus fruits. The citrus crop might turn out about as large as last year's near-record crop and a larger proportion is expected to be marketed fresh. The reduction in military procurement is likely to result in smaller quantities being processed. The apple crop will be record low according to present indications.

The civilian supplies of dried fruits in 1945-46 may be no larger than last year. The 1945-46 pack is expected to be about as large as last year. Increased procurement for liberated areas will offset at least in part the cutback in military buying. Frozen fruit supplies for civilians may approximate the 1.9 pounds per capita consumed in 1944-45.

Vegetables

There are indications that civilian vegetable supplies will be at least sufficient to meet full consumer demand at present prices, and supplies of some vegetables may exceed expected demand at these prices. Principal factors contributing to this situation are the large truck crops in prospect, the near-record potato crop, and the heavy military cutbacks on most canned and dehydrated vegetables.

Supplies of most fresh vegetables for the civilian market in the fall and early winter are expected to be considerably larger than in the same period of 1944. Military requirements from the large 1945 pack of canned vegetables have been cut practically in half because of the end of the war. Most of the cutback will accrue to U. S. civilians. With per capita supplies about as large as the 1941-42 record of 39 pounds, all canned vegetables were removed from rationing on August 15.

Military needs for potatoes, particularly dehydrated, also have been substantially reduced. Although more potatoes may be exported than previously expected and an easier domestic transportation situation may facilitate wider distribution within the United States, it is apparent that supplies of potatoes from this year's very large crop to be available to civilians in the next few months can be marketed only at prices much lower than in the past season, and purchases for price-support purposes already have been

made on a considerable scale. During the period, August 1-September 1, the U. S. Department of Agriculture purchased 3,799 carloads of potatoes, almost 2 million bushels. Of these purchases, 550 carloads are to be used in the school lunch program and for other institutional feeding, 401 will be used for canning and 931 for starch. The remainder will go to experiment stations for use largely in livestock feed (391), and to storage for later distribution (1,526). Crop reports as of September, indicated a 1945 potato crop of 433 million bushels, exceeded only by the record of 465 million bushels in 1943. As the result of reduced military needs, sweetpotato supplies for civilians this fall and winter may be much the same as last year despite the smaller crop, indicated at 68.2 million bushels in 1945-46 compared with 71.7 million last year.

Although military requirements for dry beans and peas from the 1945 crops will be smaller than in the past 2 years, the 5 percent smaller dry bean crop and 35 percent reduction in the dry pea crop, plus indicated heavy needs for relief feeding, may prevent any significant improvement in the civilian supply situation this year.

Food Grains

The end of hostilities has resulted in little change in the food grain situation. Record crops of wheat, oats, and rice and another large corn crop will provide good supplies of grains for domestic food and feed plus substantial amounts for export.

The total U. S. supply of wheat for 1945-46 is indicated at about 1,450 million bushels, considerably above the prewar average (982 million in 1932-41) and exceeded only by supplies in 1942 and 1943. The supply is made up of July 1, 1945 stocks of 281 million bushels, a crop of 1,152 million and imports of around 15 million bushels for feed. Disappearance in 1945-46 may total practically the same as last year's 1,156 million bushels. This quantity is expected to be distributed about as follows: civilian and military food - 530 million bushels; seed - 82 million; alcohol - 50; feed - 150 to 200; export as wheat and flour - 300 to 350. This would leave a carryover next July of about 300 million bushels, larger than the 235 million bushel average in 1932-41. Wheat and flour are urgently needed in liberated areas because of reduced crops and limited availability of many other foods. It is possible that even larger amounts may be exported if shipping, port and transportation facilities can be made available and financing arrangements worked out.

The 1945 rye crop in the United States is indicated at 27.9 million bushels; 8 percent more than last year's production. Total use of rye in 1945-46 may be only 37 million bushels, including 8.3 million bushels for food (somewhat less than last year) and substantially smaller quantities for feed and alcohol than last year. Despite the larger crop, a 37 million bushel distribution would reduce the carryover on July 1, 1946 to 6 million bushels, compared with 13 million on July 1, 1945 and 31 million on July 1, 1944. Per capita civilian consumption of rye flour for the calendar year 1945 is slightly below the 2.8 pounds estimated for 1944.

Despite reductions in crop prospects resulting from the Texas hurricane in late August, a record rice crop is still expected. The September crop report indicated a rice crop of 71.3 million bushels, which would be 1.6 million bushels above the record in 1944. The prospective demands for military

and civilian food in the Orient are so great, however, that if any substantial portion of this demand were met, U. S. civilian consumption would fall below the 1944 rate and below the 1935-39 average of 5.7 pounds per capita. To a considerable extent wheat is being substituted for rice by the military for civilian use in Pacific areas.

The 3.1 billion bushel corn crop now in prospect should be sufficient to furnish adequate supplies of corn for processing food products. The record oat crop also assures a supply of oats for food large enough to meet the demand in full. With the general easing of the food situation, consumption of oatmeal in 1945 may not differ greatly from the 1935-39 average of 3.0 pounds per person. No change in the consumption of barley food products is foreseen during the next few months.

Sugar

No immediate improvement in the supplies of sugar for civilians has resulted from the termination of hostilities, although reductions in military requirements have removed the possible need for further decreases. As a result of the fact that consumption in the first half of 1945 was about the same as the first half of 1944 despite a reduction in the total annual supply available, civilian consumption in the second half of 1945 will be about 1 million tons, or nearly 30 percent smaller than in the corresponding period of 1944. With seasonal decreases for industrial use and home canning in the fourth quarter, civilian supplies of sugar in that quarter will be lower than at any time during the war. However, the flow of supplies during this quarter should be more nearly adequate to cover ration allowances to all types of users than in recent months when demand has been at the seasonal peak. The decreased supplies in the second half of 1945 are largely the result of the small Cuban crop, depletion of stocks, especially in 1944 and the first half of 1945, and an increased need for sugar from this hemisphere for liberated areas.

The domestic sugar beet crop this fall will yield about 1.5 million tons of sugar (raw basis). Distribution of the product doesn't usually begin in volume until about the end of the year. By the first of next year, the domestic sugar situation will ease a little as a result of larger supplies of beet sugar. Further improvement should come in the spring from the 1946 Puerto Rican and Cuban crops of sugar cane. The 1945-46 Cuban crop probably will be slightly larger than last year, though yields per acre will be below normal because of the continuation of the drought into 1945.

The world sugar situation probably will improve somewhat in the fall of 1946 with larger beet crops in Europe and the United States. However, sugar supplies will not return to prewar levels until exports from the Philippines and Java are again available or until production in other areas materially exceeds the 1935-39 level.

Peanuts

The consumption of peanuts as nuts, as peanut butter, and in candy has increased greatly during the war because of shortages of other candy ingredients, of imported nuts, and of spreads for bread. Civilian consumption in the past three years has been at the rate of 6.0 to 6.5 pounds per capita (shelled basis), the equivalent of 1,250 to 1,300 million pounds of farmers' stock peanuts, 35 percent above the pre-war (1936-40) average. Military

procurement of peanuts has also been heavy, more than 400 million pounds of farmers' stock peanuts in 1944-45. Accordingly, relatively small quantities have been available during the war for crushing into oil and meal despite the 60 percent increase in peanut production to the war time level of 2,170 million pounds.

With production of peanuts (farmers' stock basis) indicated on September 1 at 2,260 million pounds, and expectation of substantially smaller military procurement and moderate declines in civilian consumption of peanuts as supplies of other foods increase, more peanuts probably will be available for crushing than in the past few years. Prices to farmers for farmers' stock peanuts will be supported in 1945-46 at the same level as last year and the minimum price for shellers will remain the same. Some slight decline from the ceilings, in prices of raw shelled peanuts and of peanut products, is possible this season

## The Food Situation in Continental Europe During the War 1/

The need in continental Europe for large shipments of foodstuffs from other parts of the world in 1945 and 1946 is acute.

In some respects the food problems of continental Europe closely resemble our own. There, as here, controls are imperfect and equitable distribution difficult to achieve. Our own experience with black markets, hoarding, illegal prices, and other irregularities helps us to understand these problems. In continental Europe, where military operations, occupation, and liberation have necessarily disrupted the continuity of government functions, control over food supplies has been a still greater problem, and its imperfections have had far more serious consequences.

Fundamentally, however, the food situation in continental Europe is radically different from our own. On the continent as a whole, though not in all countries, food production during the war declined steadily from prewar levels. In the United States it reached an all-time high. Continental Europe during the middle thirties was dependent upon outside sources for approximately 10 percent of its total food supplies (including food produced from imported feed). During the war, the possibilities of importing foodstuffs were sharply restricted. The United States, on the other hand, was virtually self-sufficient before the war, her main dependence being upon offshore sources of sugar. Population increases have occurred in both areas, but in the United States the increase in food production has so far outstripped the growth in population that, despite a net export of food during the later war years and large military requirements, civilian per capita consumption has been maintained. In contrast, the larger population of continental Europe has had to make out with a declining food supply.

While the drop in imports was the greatest single cause of food deficits on the continent of Europe during the war, the steady decline in agricultural production of foodstuffs and feedstuffs in most of the area was also important. Contributing to this deterioration in total farm output were the growing shortages of agricultural supplies, both domestically produced and imported, and of labor and draft power. In addition, weather conditions were unfavorable over large areas during several war years and were at no time conducive to the production of more than average crops.

1/ Prepared by Miss Lois Bacon and Mrs. Louise Butt of the Office of Foreign Agricultural Relations.

Institution of control over the type of crops produced and over the utilization of farm products saved continental Europe from some of the consequences of the decline in agricultural production that might otherwise have occurred. By growing food crops in place of feed crops, by forcing the cultivation of certain crops (such as oilseeds) to alleviate specific shortages, by using, as human food, grains and potatoes normally fed to livestock, and, most important of all, by requiring that increased amounts of flour be milled from a given quantity of grain - by these and like measures the decline in the supply of food obtained from domestic agricultural production was kept within narrower limits than the decline in agricultural production itself. The decline in the supply of domestically-produced food is estimated, in fact, to have been little more than 5 percent until 1945.

The saving so effected was, of course, accompanied by a considerable deterioration in the quality of the food produced. Dark, heavy bread was the mainstay of the diet, while more potatoes and other vegetables were consumed, both absolutely and in proportion to the total food intake, than in normal times. With livestock production curtailed by the cut in domestic as well as imported feed supplies, consumption of meat and dairy products declined sharply. Fats, imports of which had formed a large proportion of total supplies in prewar times, were everywhere at a premium.

Not only did the quality of the diet deteriorate in continental Europe but also the average per capita caloric intake fell by around 15 percent in the six war years. A decline of 15 percent in average per capita consumption, when translated into the actual consumption of specific population groups, obviously produces serious results.

Of continental Europe's 350 million people, approximately 40 percent live on farms, and most of the farm population continued to eat at or near prewar levels, thus throwing the burden of the overall decline in food supplies on the non-farm population. Moreover, non-farm supplies were inequitably distributed, for, in spite of the control measures taken in all countries, with varying degrees of comprehensiveness and success, a substantial portion of these supplies escaped from legal channels of distribution to be disposed of in the black market where prices in general were too high for people with moderate and low incomes. Of the foodstuffs which were controlled, an appreciable portion was used in most countries to provide extra rations for certain classes of workers and other groups, including armed forces, having special needs, leaving a still more reduced total to be distributed to the great majority of the urban population who belonged in the least favored ration category - the so-called normal consumer - comparatively few of whom could afford to purchase much on the black market.

There can be little question that many millions of Europeans, for five years or longer, have had to live on little more than the rations allotted to normal consumers, and that these rations have been dangerously small in a number of countries. For example, in 1944 the normal consumer ration, if fully available, plus a generous allowance of unrationed foods

(mainly fruits and vegetables) provided at most an average of only 1,750 calories per adult per day in Belgium, 1,600 in Norway, 1,400 in France, and even less in some other areas. In Germany, on the other hand, normal consumer rations provided fully 2,000 calories during much of 1944.

Variations in normal consumer rations from country to country reflect in part variations in average per capita supplies and in part variations in the efficiency of food distribution. The pattern of these variations underwent considerable change during 1944-45, as the course of the war disrupted intra-European trade, reopened new areas to overseas imports, increased the strain on damaged transportation facilities, and weakened agricultural and food controls. The following table shows average per capita supplies in selected European countries in 1944-45, the last war year.

Table 1.- Average per capita consumption of specified foods in selected European countries 1944-45, (tentative estimates)

| Foodstuffs | Denmark | Belgium | France | Czechoslovakia | Italy |
|---|---|---|---|---|---|
| | | | Pounds | | |
| ins, in terms of flour | 250.2 | 260.4 | 308.4 | 251.1 | 344 |
| atoes | 286.6 | 400.4 | 321.2 | 348.8 | 87.3 |
| ar | 66.1 | 61.1 | 27.3 | 39.0 | 3.7 |
| s (in terms of pure fat) | 37.7 | 27.6 | 15.4 | 20.9 | 11.5 |
| t, poultry, fish 1/ | 134.5 | 65.3 | 79.4 | 52.0 | 22.0 |
| le milk 2/ | 352.7 | 150.8 | 136.0 | 235.0 | 57.3 |
| | | | Calories per day | | |
| foods 3/ | 2,850 | 2,450 | 2,300 | 2,200 | 1,900 |

ice of Foreign Agricultural Relations. August 1945.
Meat, carcass weight; fish, fillet weight.
Milk for direct consumption, including processed milk in terms of fresh.
Excluding alcoholic beverages. In comparison, the average number of calories ilable in the United States per civilian per day in 1944-45 was slightly above 00 when computed on the same basis, or above 3150 calories as usually computed the United States.

Denmark, normally a surplus food producer and one of the few European countries whose food position was virtually unaffected by the events of 1944-45, maintained consumption at high levels and continued to export substantial quantities of food.

France and Belgium were among that group of countries whose food supplies showed some increase, though remaining well below prewar levels. France was liberated in time to save most of the harvest of 1944 from German requisitioning which had made inroads on her food supplies in other war years and began to receive imports from overseas. While these gains were partially offset by extracting less flour from a given quantity of bread grain than in earlier war years and by shortages of coal for processing the sugar-beet crop, food supplies rose to over 80 percent of prewar. At the same time, a further deterioration of controls and disorganization of transport prevented much improvement in urban food

supplies during the first months of liberation. However, the caloric value of food officially distributed in Paris, which had averaged 1,173 calories per person per day in 1943 and dropped to less than 900 in the first eight months of 1944, recovered to 1,150-1,300 in the period September 1944 - January 1945. Recently it has been reported that French rations provide 1,500 calories per person per day.

In Belgium, which was completely liberated in time to save the 1944 harvest from destruction or confiscation by the Germans, fuel and transportation have been at a premium, as in France, and measures for controlling food supplies have been only partially successful. Domestic production of foodstuffs alone would have provided an average of over 1,850 calories per person per day, and Allied imports raised the level of food supplies to approximately 85 percent of prewar. However, urban consumption, as reflected in the normal consumer ration, while improving, continued to give evidence of control and distribution difficulties. The caloric value of the ration rose from around 1,500 calories at the time of liberation to 1,800-1,850 by June 1945.

Though Czechoslovakia produced more food per capita than France and much more than Belgium, its food supplies were smaller in 1944-45. During much of the year, Germany could still extract food from Czechoslovakia one of its few remaining sources of imports, and toward the end of the season the liberating armies were partly supplied from Czechoslovakian stores. Consumption in the country probably amounted to around four-fifths of the prewar average.

Per capita supplies of food in Italy in 1944-45 were among the smallest on the continent. The country was divided into two zones occupied by warring forces, and in both zones disorganization of production and distribution led to great scarcity of food in urban areas. In the normally surplus northern zone, requisitions by German troops made the situation more precarious. In the normally deficit southern zone, imports from Allied sources helped to alleviate the shortage, though supplies for the urban population remained small. In Rome, official rations during the first three-quarters of 1944-45 provided less than 800 calories per person per day on the average, but between March and May they rose from 815 to 1,000 calories.

In some countries, changes were so drastic in 1944-45 as to render meaningless a figure of average per capita consumption. In the Netherlands, for example, the crops harvested in 1944 remained to a large extent undistributed over the country, while in some areas flooding and battle damage prevented either harvesting or food processing. During the winter and spring the principal population centers of the country were cut off from the food supplies available in surplus areas by a complete paralysis of transportation due to lack of fuel and to the resistance strike of the railway workers. While in that part of the Netherlands which was in Allied hands in the winter of 1944-45 rations provided on the average about 1,500 calories per day, in the western part of the German-occupied portion of the country the official rations for the adult urban population, even when available, provided an average of less than 600 calories per day. Liberation early in May brought about swift improvement; within a few weeks, a ration providing 2,000 calories, coming mainly from imported foodstuffs, was available throughout the country.

In Germany, where net imports and requisitions for consumption had amounted to perhaps 12 percent of the total food consumed in Germany and by Germany's armed forces in 1943-44, takings from the other countries were heavily reduced in 1944-45. Furthermore, the distribution of food supplies became increasingly difficult with the cumulative breakdown of the physical as well as the economic system of distribution and with mass movements of the population. As early as March normal consumer rations were cut to little more than 1,600 calories. Following Germany's surrender in May, rations in many parts of Germany fell heavily. An official report released in Frankfurt on August 21, according to the New York Times, indicates that rations of bread, cereals, sugar, meat, and butter in the American zone are at levels which would provide some 800 calories per day, while other foodstuffs available to the average consumer may provide an additional 300-500 calories.

Military events in the closing war year and the attendant disorganization of the civilian economy, which unfavorably affected the food situation in 1944-45, have also been operating against the coming year's domestically-produced supplies throughout continental Europe. Increased shortages of transportation, fuel, and raw materials brought increased shortages of fertilizers and other agricultural supplies. Heavy losses in draft animals and other kinds of livestock were experienced in some areas. New farm labor shortages developed where forced labor was released and large population movements occurred. Some land in combat areas was put out of production, at least temporarily. Food processing equipment suffered. In Eastern Europe, the special factor of extensive changes in land and agricultural policy inaugurated during 1944-45 will substantially reduce the production of food for some time to come.

Added to such adverse factors, the fall, winter, and spring of 1944-45 brought poor weather, first in the northern and later in the southern part of Europe.

Under these circumstances, continental Europe's production of food to be consumed in 1945-46 is certain to fall to a point below any reached during the war. Most countries will share in the decline in production. In eastern Europe, formerly a food surplus area, the reduction in output coupled with Russian requisition in parts of that region, will undoubtedly eliminate the possibility of significant exports to relieve the deficits of western Europe. Pre-war net exports from Poland and the Danube Basin included about 2 million short tons of wheat and rye, nearly 2 million short tons of other grains, 250,000 short tons of meat and eggs, and considerable quantities of dry legumes and fruit.

It is thus plain that only substantial food imports from outside sources can save millions of Europeans from near-starvation in the coming winter. For the experience of the war years makes it evident that the brunt of food shortages is borne ultimately by the middle and low income groups of the urban population. A decline of 10 percent in food supplies in continental Europe as a whole, for example - a decline in which the farm population and some other favored groups would share very little, if at all, - would mean a decline of 15-20 percent in supplies available to the great majority of the

urban population, and an even greater decline in supplies available to large numbers of persons within this group. When the low levels of urban consumption prevailing during the year just ended and the certain decline of food production for the coming year are recalled, the extreme need of continental Europe in 1945-46 is clearly apparent.

## Supply and Distribution of Dried Fruits, 1935-44

Civilian per capita consumption of dried fruits has not varied much in the last 25 years from the average of slightly less than 6 pounds (processed weight). Three exceptions were the pack years 1931, 1941, and 1942, when consumption averaged less than 5 pounds per person. In the latter two years, this was due to smaller production in 1940-41 and 1941-42, and to the sudden impact of military procurement and large purchases for lend-lease.

Annual domestic production or pack of all dried fruits in the past 20 years has been close to the 1.1 billion pound (processed weight) average for 1935-39, except for the crop years 1940-41 (1/4 lower than 1935-39) and 1943-44 (1/5 higher).

Imports of dried fruit averaged 62 million pounds (processed weight) for 1935-39, or about 8 percent of average total consumption. Imports dropped from 71 million pounds in 1936-37 to 48 million pounds in 1940-41, and decreased to negligible quantities in 1942-43 and 1943-44 on account of war shipping conditions. Imports for 1944-45 amounted to 26 million pounds. Dates constituted roughly 5/6 of such imports in 1935-39, with figs, raisins, and currants accounting for the balance.

Exports of dried fruit averaged about 400 million pounds in 1935-39 or slightly over 1/3 of domestic pack. They dropped to 50 million pounds in 1942-43 but increased to about 115 million pounds in 1944-45. Lend-lease requirements have accounted for approximately 3/4 of all exports and shipments abroad since 1941. Prunes, raisins, and currants make up the bulk of the exports.

Raisin and currant per capita consumption averaged about 2-1/4 pounds in 1935-39, or about 40 percent of total consumption of dried fruit by U. S. civilians. Per capita consumption was about 1/3 below the pre-war average in 1941-42, and about 1/3 above in 1943-44. Otherwise, it has stayed near the 2-pound rate for the last 10 years. Prunes made up 30 to 35 percent of total dried fruit consumption before the war. With the exception of 1941, this rate of slightly less than 2 pounds per person has been maintained during the war. Per capita consumption of dried apples, dried apricots, and dried peaches combined was reduced from the pre-war level of approximately 0.7 pounds in 1940-41 to practically zero in 1942-43 as a result of military and lend-lease takings. Last year it was roughly two-thirds of the pre-war level.

Fewer dates were consumed during the war than in previous years because imports were greatly reduced. Fig consumption has remained fairly stable near the pre-war level of about 1/3 pound per capita (except for 1942-43 when it showed some increase). Only relatively small quantities of figs have been purchased for military and export use.

Table 2.- Dried fruits, processed weight: Supply and distribution, pack years 1935-44 1/

| Pack year | Supply: Production 2/ | Supply: Beginning commercial stocks 3/ | Supply: Imports 4/ | Supply: Total supply | Distribution: Ending commercial stocks 3/ | Distribution: Commercial exports and shipments 4/ | Distribution: Dept. of Agriculture net purchases for export 5/ | Distribution: Domestic disappearance: Military 6/ | Distribution: Domestic disappearance: Civilian: Total | Distribution: Domestic disappearance: Civilian: Per capita |
|---|---|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Lb. |
| 1935 | 1,171 | 226 | 67 | 1,464 | 294 | 426 | | | 744 | 5.8 |
| 1936 | 924 | 294 | 71 | 1,289 | 233 | 361 | | | 695 | 5.4 |
| 1937 | 1,161 | 233 | 63 | 1,457 | 295 | 450 | | | 712 | 5.5 |
| 1938 | 1,174 | 295 | 56 | 1,525 | 339 | 478 | | | 708 | 5.4 |
| 1939 | 1,125 | 339 | 53 | 1,517 | 362 | 329 | | | 826 | 6.2 |
| Average 1935-39 | 1,111 | 277 | 62 | 1,450 | 304 | 409 | | | 737 | 5.7 |
| 1940 | 804 | 362 | 48 | 1,214 | 231 | 139 | | | 844 | 6.3 |
| 1941 | 905 | 231 | 16 | 1,152 | 211 | 76 | 273 | 65 | 527 | 4.0 |
| 1942 | 1,021 | 250 | 2 | 1,273 | 70 | 49 | 399 | 164 | 591 | 4.5 |
| 1943 | 1,339 | 70 | 1 | 1,410 | 158 | 89 | 260 | 135 | 768 | 5.9 |
| 1944 | 1,138 | 158 | 26 | 1,322 | 153 | 115 | 136 | 194 | 724 | 5.6 |

1/ Includes dried packs of apples, apricots, Zante currants, dates, figs, peaches, pears, prunes, and raisins, except for unmerchantable figs and substandard prunes. 2/ Production estimates 1941-44 made by Federal Interdepartmental Supply Estimates Committee. Prior estimates from "Deciduous Fruit Statistics" by S. W. Shear and various trade and Government sources. 3/ Commercial stock data from Department of Commerce. Stock data are more complete for 1942-43 than for previous years. 4/ Data on imports and commercial exports and shipments are from the Department of Commerce. Commercial exports and shipments exclude all quantities procured by the Department of Agriculture for lend-lease, Red Cross, or for paying Governments. 5/ Data on net purchases of the Department of Agriculture for export were derived by adding changes in U.S. Department of Agriculture stocks (not available for publication) to Department of Agriculture shipments. The net purchase data represent net takings from current production. They could also be derived by subtracting resales to the trade, to the armed forces and quantities used for special civilian programs from the procurement data of the Department of Agriculture. 6/ Military data are total military procurement, including purchases from the Department of Agriculture and quantities used for civilian relief feeding; data taken from reports by the armed services to the Department of Agriculture.

to satisfy fully consumer demand throughout the year. Meat consumption per person in 1946 is expected to reach 145 to 155 pounds wholesale dressed weight, compared with 130 pounds this year. Last year's civilian consumption of 150 pounds per capita was the highest rate in over 30 years.

Although there will be more butter next year than in 1945, butter will still be relatively scarce. Expected strong demands for fluid milk and cream, ice cream, cheese and other dairy products will tend to prevent any material increase in butter production unless wholesale and retail price ceilings on butter are raised still further or removed. In the latter case there would be a substantial advance in the price of butter and a considerable diversion of milk from other uses to butter manufacture.

Sugar supplies should improve but will still be considerably below full consumer demand at present prices. Much larger supplies of canned fruits will be available than in 1945, but military needs will be sufficiently large to prevent civilian supplies from exceeding the prewar level. Supplies of canned fish will also increase, but military requirements and the needs of liberated areas probably will hold the civilian consumption of canned fish below the prewar average.

This year's total food supply is now estimated to be slightly smaller than last year's. As a result, civilian per capita consumption this year will fall below the 1944 rate, although it will still be as much as 9 percent above 1935-39. The relatively high level of civilian consumption in 1945 as a whole was made possible by reduction in Government procurement since the end of the war, together with bumper crops and near record livestock production. It now appears that military takings for 1945 will amount to only slightly more than in 1944. The rate of military procurement was running at least a fourth above 1944 until the end of the war. Purchases of food in 1945 for export and shipment abroad (excluding military relief feeding since it is included in military takings) may turn out somewhat smaller than last year. However, the actual shipments of food out of the country may be almost as large as last year because large quantities were shipped out of Government stocks accumulated during the war years.

-- October 26, 1945

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1942, 1943, 1944, and forecasts for 1945 with percentage comparisons,

(Index numbers, 1935-39 = 100)

| Item | 1942 | 1943 | 1944 | 1945 preliminary | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|
| Food grains 2/ | 139 | 116 | 148 | 158 | 107 |
| Truck crops 3/ | 129 | 124 | 135 | 141 | 104 |
| Fruits and nuts 4/ | 117 | 107 | 123 | 117 | 95 |
| Vegetables, excluding truck crops 5/ | 104 | 125 | 106 | 113 | 107 |
| Sugar crop 6/ | 110 | 81 | 82 | 96 | 117 |
| Total food crops 7/ | 124 | 116 | 129 | 133 | 103 |
| Meat animals 8/ | 132 | 150 | 155 | 140 | 90 |
| Poultry 9/ | 131 | 152 | 153 | 151 | 99 |
| Dairy products 10/ | 114 | 113 | 116 | 122 | 105 |
| Total food livestock | 126 | 138 | 141 | 136 | 96 |
| Total production | 125 | 132 | 138 | 135 | 98 |
| Total agricultural production | 124 | 128 | 136 | 131 | 96 |
| Civilian per capita food consumption | 107 | 106 | 111 | 109 | 98 |

1/ Production indexes are based on the October crop report and estimated marketings and home consumption of livestock and livestock products for the calendar year 1945.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloupe, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for manufacture (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.-Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943, 1944, 1945, with percentage comparisons 1/

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 Prel. | 1945 as a percentage 1935-39 | 1945 as a percentage 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Percent | Percent |
| Meats (dressed weight) | | | | | | | |
| Beef | 54.8 | 61.2 | 49.6 | 55.1 | 55 | 100 | 100 |
| Veal | 8.0 | 8.0 | 7.9 | 11.2 | 11 | 138 | 98 |
| Lamb and mutton | 6.7 | 7.2 | 6.4 | 6.6 | 7 | 104 | 106 |
| Pork (excluding lard) | 56.1 | 61.5 | 72.4 | 76.7 | 57 | 102 | 74 |
| Total meats | 125.6 | 137.9 | 136.3 | 149.6 | 130 | 104 | 87 |
| Poultry products | | | | | | | |
| Eggs 2/ | 37.3 | 38.9 | 43.1 | 43.9 | 48.8 | 131 | 111 |
| Chicken (dressed weight) | 17.9 | 21.5 | 23.0 | 23.6 | 24.7 | 138 | 105 |
| Turkey (dressed weight) | 2.6 | 3.7 | 3.4 | 3.3 | 4.4 | 169 | 133 |
| Dairy products | | | | | | | |
| Total milk (whole milk equivalent) | 801 | 839 | 764 | 788 | 793 | 99 | 101 |
| Cheese | 5.5 | 6.3 | 5.0 | 5.0 | 5.7 | 104 | 114 |
| Cond. and evap. milk | 16.7 | 18.3 | 18.6 | 16.2 | 18.6 | 111 | 115 |
| Fluid milk and cream | 340 | 372 | 403 | 423 | 438 | 129 | 104 |
| Fats and oils | | | | | | | |
| Butter, farm and factory (actual weight) | 16.7 | 15.6 | 11.8 | 11.9 | 10.7 | 64 | 90 |
| Lard | 11.0 | 13.6 | 14.6 | 13.9 | 11.6 | 105 | 83 |
| Margarine (fat content) | 2.3 | 2.2 | 3.1 | 3.1 | 3.3 | 143 | 106 |
| Shortening (fat content) | 11.7 | 8.9 | 9.8 | 9.2 | 9.6 | 82 | 104 |
| Other edible fats and oils (fat content) | 6.3 | 7.6 | 6.4 | 6.6 | 6.3 | 100 | 95 |
| Total fats and oils 3/ | 48.0 | 47.9 | 45.7 | 44.7 | 41.5 | 86 | 93 |
| Fruits | | | | | | | |
| Fresh | | | | | | | |
| Citrus | 48.8 | 57.0 | 59.6 | 68.0 | 66 | 135 | 97 |
| Apples (commercial) | 30.2 | 26.7 | 25.1 | 26.5 | 22 | 73 | 83 |
| Other (excluding melons) | 50.5 | 46.1 | 36.2 | 50.3 | 58 | 97 | 115 |
| Total fresh | 138.5 | 129.3 | 120.9 | 144.8 | 146 | 105 | 101 |
| Processed | | | | | | | |
| Canned fruit | 15.2 | 16.3 | 12.2 | 8.9 | 15 | 99 | 169 |
| Canned juices | 4.1 | 7.2 | 6.6 | 10.0 | 10.2 | 249 | 102 |
| Frozen | 4/ .7 | 1.6 | 1.3 | 2.0 | 2.3 | 329 | 115 |
| Dried | 5.7 | 4.5 | 5.9 | 6.5 | 6.5 | 114 | 100 |

-- Continued

Table 2.--Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1942, 1943, 1944, 1945, with percentage comparisons 1/ -- continued

| Commodity | Average 1935-39 | 1942 | 1943 | 1944 | 1945 prel. | 1945 as a percentage 1935-39 | 1945 as a percentage 1944 |
|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Percent | Percent |
| Vegetables | | | | | | | |
| Fresh | 235 | 251 | 236 | 254 | 264 | 112 | 104 |
| Canned | 31.1 | 38.7 | 33.7 | 33.5 | 40-45 | 129-145 | 119-134 |
| Frozen | .4 | 1.0 | .7 | 1.6 | 1.6 | 400 | 100 |
| Potatoes | 130 | 118 | 133 | 126 | 130 | 100 | 103 |
| Sweetpotatoes | 23.3 | 19.3 | 21.2 | 21.0 | 20.7 | 89 | 99 |
| Beans, dry edible | 8.8 | 8.7 | 8.4 | 7.0 | 7.3 | 83 | 104 |
| Beans, dry field | .5 | 1.0 | 1.0 | 1.1 | .9 | 180 | 82 |
| Canned soups & baby foods | 5.2 | 8.5 | 6.9 | 8.8 | 9.4 | 181 | 107 |
| Sugar (refined) | 96.5 | 86.2 | 80.3 | 89.0 | 73 | 76 | 82 |
| Grains | | | | | | | |
| Corn products: | | | | | | | |
| Corn meal | 23.9 | 21.8 | 22.6 | 22.6 | 22.6 | 95 | 100 |
| Corn sirup | 7.7 | 14.3 | 12.5 | 13.4 | 13.6 | 177 | 101 |
| Corn starch | 1.3 | 1.7 | 1.8 | 1.4 | 1.4 | 108 | 100 |
| Corn sugar | 3.2 | 5.5 | 5.0 | 4.6 | 4.8 | 150 | 104 |
| Breakfast food | 1.7 | 2.5 | 2.6 | 2.5 | 2.6 | 153 | 104 |
| Hominy | 1.2 | 1.8 | 1.8 | 1.8 | 1.7 | 142 | 94 |
| Oats | | | | | | | |
| Oatmeal | 3.9 | 4.8 | 4.0 | 3.2 | 4.1 | 105 | 128 |
| Barley | | | | | | | |
| Barley food products 5/ | 1.2 | 1.4 | 1.5 | 1.5 | 1.5 | 125 | 100 |
| Wheat | | | | | | | |
| Flour 6/ | 153.1 | 155.7 | 161.3 | 161.0 | 163.6 | 107 | 102 |
| Breakfast food | 3.7 | 3.8 | 3.7 | 3.7 | 3.8 | 103 | 103 |
| Rye | | | | | | | |
| Rye flour | 2.2 | 2.7 | 3.3 | 2.8 | 2.5 | 114 | 89 |
| Rice, milled | 5.7 | 5.9 | 6.3 | 6.7 | 6.0 | 105 | 90 |
| Beverages | | | | | | | |
| Coffee 7/ | 14.0 | 13.4 | 13.0 | 15.8 | 16.7 | 119 | 106 |
| Tea | .67 | .53 | .46 | .53 | .66 | 99 | 125 |
| Cocoa | 4.4 | 3.8 | 2.9 | 3.6 | 3.9 | 89 | 108 |
| Peanuts (shelled) | 4.7 | 6.9 | 6.3 | 6.1 | 6.2 | 132 | 102 |

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for under-enumeration of children under 5 and for military personnel eating out of civilian supplies. 1/ Data for 1945 are preliminary; calendar year basis except for canned fruits, canned vegetables, and dried fruits which are on a pack year basis; potatoes and sweetpotatoes which are on the basis of a year beginning July; fresh citrus fruits, peanuts dry edible beans, and dry field peas on a crop-year basis, rice on an August 1 year. All years beginning in the year designated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 317 in 1942, 345 in 1943, 351 in 1944, and 390 in 1945. 3/ Includes actual weight of butter, fat content of other items. 4/ Average 1937-39. Data prior to 1937 are not available. 5/ All barley food products in terms of malt equivalent. 6/ Includes white, whole wheat, and Semolina flour. 7/ Green bean basis.

Table 3.- Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1945 1/

| Year | Source of total food: Total food disappearance | Source of total food: Food production | Source of total food: Imports | Source of total food: Reduction in stocks | Source of total food: Increase in stocks | Distribution by claimants: Civilian | Distribution by claimants: Military, including military relief feeding | Distribution by claimants: Department of Agriculture: Net purchases | Distribution by claimants: Department of Agriculture: Shipments | Distribution by claimants: Department of Agriculture: Reduction in stocks | Distribution by claimants: Department of Agriculture: Increase in stocks | Distribution by claimants: Comm'l. Exports and shipments 3/ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Percentage of food disappearance in each year | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.5 | 6.0 | | .5 | 93.7 | 2.1 | 2.5 | 2.3 | | .2 | 1.7 |
| 1942 | 100.0 | 94.1 | 3.8 | 2.1 | | 86.3 | 6.5 | 6.2 | 5.2 | | 1.0 | 1.0 |
| 1943 | 100.0 | 95.3 | 4.9 | | .2 | 78.9 | 11.7 | 8.1 | 7.1 | | 1.0 | 1.3 |
| 1944 | 100.0 | 94.5 | 4.8 | .7 | | 80.3 | 12.7 | 5.8 | 6.5 | .7 | | 1.2 |
| 1945 (prel.) | 100.0 | 94.9 | 4.8 | .3 | | 80.4 | 13.3 | 4.6 | 5.8 | 1.2 | | 1.7 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 114.1 | 107.8 | 6.9 | | .6 | 106.9 | 2.4 | 2.8 | 2.6 | | .2 | 2.0 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.4 | 8.1 | 7.8 | 6.5 | | 1.3 | 1.3 |
| 1943 | 129.7 | 123.7 | 6.3 | | .3 | 102.3 | 15.2 | 10.5 | 9.3 | | 1.2 | 1.7 |
| 1944 | 136.8 | 129.3 | 6.6 | .9 | | 109.9 | 17.4 | 7.9 | 8.8 | .9 | | 1.6 |
| 1945 (prel.) | 133.4 | 126.5 | 6.5 | .4 | | 107.2 | 17.8 | 6.1 | 7.7 | 1.6 | | 2.3 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year.

2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 and 1945, however, shipments exceeded purchases and stocks were decreased.

3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture.

## NUTRITIVE OUTLOOK FOR 1946

In general, the civilian level of nutrition in 1946 is expected to be relatively high for the country as a whole, and per capita supplies of individual nutrients may be much the same as highs of 1944. This forecast assumes a relatively high level of commercial food production, as well as the continuation of a substantial volume of home gardens and the effective distribution of such surpluses as may occur in some areas at times during the year.

The supply of food energy may average 3500 calories per day per person, 7 or 8 percent above prewar and a little more than this year. The additional calories in the average daily diet next year will be furnished by higher consumption of meats, fats and oils, and sugar. With increased supplies of other foods and some decrease in consumer purchasing power, the consumption of fresh vegetables probably will fall off slightly. Accordingly, the daily supply of Vitamin A and ascorbic acid will decrease somewhat. If the enrichment of bread and flour should continue at present levels, the supplies of the B vitamins and iron would remain high. The forecasted slight drop in fluid milk consumption next year from the 1945 record will mean a little less calcium and riboflavin.

There has been a marked improvement in the average diets of the civilian population during the war, resulting from increased fluid milk consumption, enrichment of grain products, greater consumption of green and yellow vegetables, tomatoes and citrus fruits. Since these estimates of the general level of nutrition are based on average food consumption per capita, they average the consumption of both high and low income families. During the war, many families have been able to afford more food than ever before, but many people in higher income groups were unable to buy as much of some foods as they wished. Although the general level of diets may remain high in 1946 because the higher income families will buy more of some foods, the diets of low income families will be materially affected by decreases in their purchasing power.

## COMMODITY REVIEWS

### MEATS

Outlook for 1946

Outlook for civilian meat supplies next year is materially improved by the prospective reduction in military procurement and a continued high level of meat production. Production of about 23 billion pounds of meat, slightly above 1945 output, is forecast. Imports will continue small. Military procurement of meat next year may not exceed 1 billion pounds compared with estimated 1945 takings of 4 to 4 1/2 billion pounds. Exports and shipments, mostly to the United Kingdom and liberated areas of Europe, are expected to be much the same as in 1945, about 1 to 1 1/2 billion pounds, if satisfactory financing arrangements are completed. The major part of this meat will be shipped to liberated areas in the first half of the year.

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

This supply situation will permit civilian consumption per capita at an annual rate of between 140 and 150 pounds wholesale dressed weight until the fall, when supplies will increase still further. For the year as a whole, civilian supplies may average 145 to 155 pounds. Consumer demand may exceed supplies somewhat in the first part of the year, particularly for pork and the better grades and higher priced cuts of other types of meat. If meat price controls and consumer subsidies on meat are removed sometime in 1946, prices of the better grades and more desirable cuts would probably increase from current levels. However, this increase probably would be about offset by lower prices for other grades and cuts as meat supplies become more plentiful in the latter part of the year.

Meat production will continue large for several years and per capita supplies will be much above the average for 1935-39. Meat production in 1935-39 averaged 16 billion pounds per year. During the war, meat production was greatly increased, reaching a peak of more than 24 1/2 billion pounds in 1944. The great increases in meat production were made possible partly by the accumulation of reserves of feed grains and wheat in prewar years and partly by increased efficiency in feed grain production, together with better than average weather. Cattle numbers are now at near record levels and large slaughter is likely for the next 2 or 3 years. Pork production may be moderately greater in 1946 than in 1945, even if market weights of hogs are reduced. Marketings of hogs have been delayed in 1945, and some hogs that normally would have been marketed this year will come to market in 1946. However, output of lamb and mutton will be reduced in 1946, reflecting continuation of the decline in sheep numbers during 1945.

Review of 1945

Through most of 1945, meat supplies have been much shorter than last year, because of the 2 billion pound decrease in output from the 1944 record of 24.6 billion pounds. Purchases for non-civilian use were about equal in the 2 years, although the military takings constituted a larger part of the total this year. Civilian consumption for the year totaled about 17 billion pounds, 2-1/2 billion pounds less than in 1944 when meat output set a new record and stocks were reduced considerably. On a per capita basis, civilians this year consumed 130 pounds of meat wholesale dressed weight, compared with 150 pounds in 1944 and the 126-pound annual average for 1935-39.

Meat supplies became tight early in 1945 when hog slaughter dropped off, military procurement took over 20 percent of total supply, and an additional 5 percent was purchased for shipment to our allies. Production dropped off seasonally in the late spring and summer and as military needs were still large, exports were considerably reduced in order that civilian supplies should not fall below an annual rate of 115 pounds per person. Even so, civilian supplies during the late spring and supper were so small compared with large potential consumer demand (perhaps one-fourth below) that distribution of available supplies was very spotty and black markets flourished. To meet these problems of distribution and to assure supplies for war use, several Government actions were taken. Control Order No. 1 was instituted, setting slaughter quotas for non-federally inspected slaughterers and requiring distributors to deliver civilian supplies according to the trading area distribution in the first quarter of 1944. An enforcement campaign was waged against meat sales above ceiling prices and without surrender of ration points. Also, the Department of Agri-

culture set up a certification system for non-federally inspected plants so that they could ship meat across State lines and sell meat to the Government.

Since the end of the war, the military procurement program has been sharply curtailed. With the seasonal rise in output, civilian supplies considerably increased and increased exports to liberated areas have been scheduled. The gain in civilian supplies permitted notable reduction in ration point values for September and for October.

On September 8, slaughter quotas administered by the Office of Price Administration and area distribution controls were suspended. Set asides of beef and veal, hams, and bacon for Government purchase were taken off on August 19 and on September 2 were taken off all other pork cuts. However, set asides on lower grades of beef and veal and all mutton were reinstituted on October 14 to expedite Government procurement of meat for shipment to liberated areas.

Most of the reduction in meat supplies in 1945 compared with 1944 was in pork. Pork output decreased 20 to 25 percent because of the smaller pig crops in the fall of 1944 and spring of 1945. Beef production in 1945 is estimated at 10 billion pounds, 10 percent above 1944 output. Veal and lamb and mutton production are about equal in the 2 years.

## FISH

### Outlook for 1946

Marketings of fresh and frozen fish in 1946 are expected to be somewhat larger than in 1945. Imports will remain about the same. Civilian supplies per capita are also expected to be slightly above the 6.3 pound (dressed weight equivalent) estimated for 1945. Consumption should show a similar increase, particularly if fish prices decline as a result of increased supplies of fish and of many other foods, particularly meats. In the early war years, prices of fish increased more than those of many other foods.

Fish supplies available to consumers next year will probably contain a higher proportion of the common varieties and sizes than during the war years. Inland consumers are likely to have much larger supplies and wider range of choice, as transportation and distribution facilities improve and market competition becomes keener. Continuation of the trend toward larger use of frozen fish products is expected. This will be facilitated by improvement of inland transport, the development of higher quality products and increases in the production of dressed or filleted fish.

If exports of canned fish in 1946 are much the same as this year, civilian supplies in 1946 will be about 530 million pounds. The increased supply results from reduced military needs. This total will provide an average of about 3.8 pounds per capita, compared with the 2.8 pounds expected in 1945, and the 5-pound national average in 1935-39. Civilians throughout the nation may expect supplies to increase early in 1946 as distribution approaches normal. Total civilian demand is expected to remain strong, with prices of canned fish in 1946 holding at or near present ceilings.

Review of 1945

Civilian supplies of fresh and frozen fish this year will be the largest since the start of the war, and about 10 percent larger than in 1944. They are expected to be slightly larger than the prewar (1935-39) national average of about 6.3 pounds per capita (dressed weight equivalent).

Total marketings of fresh and frozen fish may be 10 to 12 percent greater in 1945 than in 1944, due to an increase in the number of boats, improvements in efficiency of boats and equipment, and the lifting of restrictions on fishing areas. Production (freezings) of frozen fish in 1945 is expected to surpass 1944 record freezings by one-tenth. Frozen fish stocks are currently below 1944 record holdings, but still somewhat above average. Imports of fresh and frozen fish will be greater than in 1944 due principally to an increase in imports of frozen fillets from Canada. Military takings, primarily of frozen fish, will be somewhat lower than in 1944.

The canned fish pack in 1945 is expected to be about 630 million pounds, slightly less than in 1944, but imports will be larger. Exports of canned fish may total 130 million pounds, compared with 108 million pounds in 1944. Military requirements are indicated at about 165 million pounds.

Civilian supplies of canned fish in 1945 probably will approximate 370 million pounds (net weight), or about 2.8 pounds per capita, compared with the national average of 2.4 pounds in 1944, and the 1935-39 average of about 5 pounds.

POULTRY AND EGGS

Outlook for 1946

Total supplies of poultry products next year probably will average much the same as in 1945. With reduced military needs and prospective increases in red meats, civilian supplies of poultry products are expected to exceed consumer demand at present prices in many areas. In other words, egg prices probably will be substantially lower than in 1945 and chicken and turkey prices moderately lower.

Civilian egg consumption in 1946 undoubtedly will fall below the 1945 record of 390 eggs per capita, but may exceed the 1944 rate of 351 eggs. Egg supplies will be plentiful, as only slight decreases in production are in sight for 1946. Under the Steagall amendment, the Department of Agriculture is committed to support egg prices at 90 percent of parity for 2 years after the end of hostilities. It is expected that eggs purchased for price support will be made available for supplementary food programs such as school lunches and for export, mostly as dried egg.

Slaughter of chickens next year, including commercial broilers, may be slightly below 1945 output. Military procurement in 1946 will be substantially smaller than this year and total civilian supplies will be larger. With civilian population augmented by demobilization, the per capita rate of chicken supplies may be about 23 to 25 pounds, dressed weight, nearly as large as in 1945. Turkey production probably will remain large and military needs will decrease, but civilian consumption on a per person basis probably will be about 4 pounds, slightly below the 1945 rate.

Review of 1945

In the first 7 or 8 months of 1945 the supply situation for poultry products was much tighter than in 1944. Last year, eggs and chickens were freely available, and prices were below ceilings for most of the year in many areas. In 1945, however—until the sudden end of the war resulted in heavy cutbacks in Government procurement—large non-civilian takings and the shortage of meats for civilians in 1945 caused consumer demand to exceed supplies, particularly of higher grade eggs and chicken.

Egg production in 1945 is currently estimated at 5050 million dozen, 255 million dozen below the 1944 record. Under its price support commitments and to supply lend lease requirements, War Food Administration last year bought more than 800 million dozen eggs. Egg purchases by USDA in 1945 dropped to around 100 million dozen because of reduced production, heavy civilian demand, and apparent military procurement of about 500 million dozen eggs. With meat supplies short, civilian egg consumption this year set a new record of 390 eggs per person, 11 percent above the previous record of 351 in 1944 and 31 percent above the annual average of 298 per person for 1935-39. Despite the very high rate of consumption, demand exceeded supplies in many areas until the end of the war. In fact, higher grade eggs are still short in some markets.

Despite the increase of 1/3 in chicken production since 1940, civilian chicken supplies were held down until after V-J Day because military procurement was even larger than in 1944. More than 1/10 of the year's chicken production went to the armed forces, the largest amounts being purchased in the commercial broiler areas. As a result, areas normally dependent on commercial broiler production for chicken meat supplies, principally the Northeast, were disproportionately affected. Since August 27 when set asides on chicken were terminated, civilian supplies have increased so much that per capita consumption for the year as a whole may average 24.7 pounds. This average compares with 23.6 pounds in 1944, the record of 28 pounds in 1943 (another year of short meat supplies), and the 18 pound average for 1935-39.

Because of the favorable price and demand situation in prospect for this year, turkey meat production was increased to a new record of 650 million pounds dressed weight, 100 million pounds above that of 1944 and 300 million pounds above the pre-war average. Procurement for the armed forces was substantially completed much earlier this year than last. The set aside was terminated on September 24 this year, whereas in 1944 it continued until the middle of November. Estimated military procurement is substantially below the 100 million pounds purchased in 1944, so civilians are benefiting directly from the increase in turkey production. Record amounts of turkey will be available for the holiday season. Per capita civilian consumption is estimated at about 4 1/2 pounds, a third above last year's and nearly twice as large as in 1935-39.

## DAIRY PRODUCTS

Outlook for 1946

Reduction of two-thirds or more in military procurement of dairy products, will enable civilian consumption in 1946 to reach prewar levels of 800 to 825 pounds per capita, whole milk equivalent basis, although not up to the 1942 record of 838 pounds. Milk production in 1946 is forecast at 1 to 3 percent below the indicated record of 123 billion pounds in 1945.

Because of the large milk production in prospect for 1946 coupled with reduction in Government procurement of dairy products for the armed forces and for export (although to a smaller degree), civilian supplies of most dairy products except butter are expected to be reasonably well in line with demand at present prices most of the year.

Although shipments of manufactured whole milk dairy products to the United Kingdom and liberated areas of Europe were reduced at the end of the war, they are being expanded again upon completion of suitable financial arrangements.

Total marketings of milk as fluid milk and cream are expected to increase next year. However, as demobilization progresses, the rate of civilian consumption per person probably will decrease perhaps to the 1944 level of 420 to 425 pounds from the 1945 record of about 438 pounds. Average fluid milk and cream consumption in 1935-39 was 340 pounds. Indications are that the decreases may come in fluid milk, as sales of fluid cream were restricted until the end of the war and are now very high.

Potential 1946 demand for whole milk products and for fluid cream appears to be large enough to prevent butter production from increasing much beyond the 1944 level of around 1800 million pounds unless wholesale and retail price ceilings are raised still further or removed. If so, there would be a substantial advance in the price of butter and a considerable diversion of milk from other uses to butter manufacture. After allowing for some military procurement, civilian butter supplies per capita may be about 12 to 12 1/2 pounds, somewhat more than in the past 3 years but considerably below the 16.7 pound average for 1935-39.

Although some decreases in the manufacture of whole milk dairy products are expected to result from greatly reduced Government procurement, supplies probably will be large enough during most of the year to satisfy consumer demand at present prices. Consumption of these products is expected to be at a record high rate per person. Restrictions on ice cream production in effect since November 1942 have been lifted (September 1) and consumption probably will increase as much as short sugar supplies will permit.

The prospective civilian supplies of skim milk products will permit per capita consumption as large next year as in 1945. More dried skim milk will be available than this year, and supplies of cottage cheese, chocolate milk, buttermilk, etc., will continue large.

## Review of 1945

Wartime changes in utilization of the total milk supply culminated this year in new high records for use as fluid milk and cream, condensed and evaporated milk, cheese and dried whole milk. Under war pressures, its use in butter production was the lowest in more than two decades. Although milk production will set a new record of at least 123 billion pounds in 1945, 20 percent above 1935, war needs for milk have exceeded supplies. Various types of controls were in effect until August or September when military and export cutbacks were made after the end of the war. The only War Food Order still in effect is WFO 11 which requires certain marketing economies. Butter is the only dairy product still being rationed.

Per capita civilian consumption of fluid milk and cream in 1945 is now estimated at about 433 pounds, almost 30 percent above the prewar average. Although fluid milk supplies have nearly equalled consumer demand during the year, sales of both heavy and light fluid cream were restricted until fall. Since restrictions have been removed, trade information indicates substantial increases in fluid cream marketings, apparently contributing to decreases in creamery butter production.

On August 31, the set aside order on creamery butter was terminated, as military needs had been substantially met by procurement during the season of heaviest production. In fact, about 80 million pounds of butter are being turned back by the Army into commercial channels and an additional 17 million pounds are being turned back by War Shipping Administration and Commodity Credit Corporation. These amounts will supplement civilian supplies during winter months of lowest production. Butter production this year is estimated near 1,720 million pounds, compared with the 1935-39 annual average of 2,170 million. Net military procurement is indicated at 250 to 275 million pounds and exports and shipments at 30 to 40 million pounds. Accordingly, civilian consumption in 1945 may not exceed 10.7 pounds per capita, the lowest in over 50 years.

Cheese supplies for civilians were rather short until August when Government procurement for the armed forces was considerably reduced. Although supplies now are somewhat larger than then, they are insufficient in many areas to meet full demand at present prices. Ration point values were set at zero on September 12. Controls over production and the required set aside for Government purchase were terminated, retroactive to September 1, 1945. Allowing for some increases in exports before the end of this year, per capita civilian cheese consumption is expected to average about 5-1/2 to 6 pounds for 1945, well above the 5-pound rate for 1943 and 1944. The important factor in the higher consumption rate for 1945 has been the increase of 10 percent in cheese production. Production probably will set a new record this year — about 900 million pounds of American type and 240 million pounds of other whole milk cheeses.

Production of evaporated milk and dried whole milk has also been increased at least 10 percent from 1944, in order to supply a larger part of the heavy civilian demand and provide for continued large Government procurement. Purchases for the armed forces took roughly 1/3 of current evaporated milk and dried whole milk production from the first of the year until end of the war. Since then, these purchases have been greatly reduced. In addition, about 1/10 of evaporated milk production and 1/3 of dried whole milk production were being shipped to our allies and to liberated areas. Even though exports are expected to increase before the end of the year, civilian consumption of evaporated and condensed milk may be as large as the 1943 per capita rate of 18.6 pounds. Dried whole milk consumption per civilian may be slightly lower than consumption in 1944.

## FATS AND OILS

### Outlook for 1946

Supplies of food fats and oils for civilians next year will be larger than this year, although probably below consumer demand at present prices for at least the first half of the year. Domestic production of fats will be up from 1945, and military and export takings are likely to be smaller. Exports will be above the 1935-39 level but materially less than in the 20's. Imports of edible oils and fats probably will continue at an exceptionally low rate. In the latter part of 1946, some coconut oil from Philippine copra may become available for use in food products. Stocks of fats and oils on January 1, 1946 will be materially smaller than in recent years.

Civilians will get most of next year's slightly increased butter production. Supplies will still be considerably below what consumers would buy even with the 5 or 6 cent increase in retail price per pound resulting from the removal of the roll-back subsidy.

Lard production will increase in 1946 on the basis of the larger pig crop expected this fall. Although slaughter of hogs from this fall's crop will not begin until late spring and summer, a large number of hogs from the 1945 spring crop apparently will not be marketed until after the first of the year and then at heavier weights. Accordingly, lard output may increase soon after the first of the year. If satisfactory financing is arranged, substantial amounts of lard may be shipped in the early part of 1946 to liberated Europe where fats are extremely scarce. Even so, the civilian lard supply in 1946 probably will be greater than in 1945.

Civilian supplies of shortening and other edible fats and oils products may be somewhat larger next year than in 1945, principally because of reduction in non-civilian use. Cottonseed oil production will be down materially in the first half of 1946 compared with that period of 1945, as a result of the 20 percent reduction in the cotton crop. Soybean and peanut oil output may be slightly larger than a year earlier.

### Review of 1945

Fats and oils supplies for civilian consumption in 1945, much below consumer demand, have been the smallest on a per capita basis in more than 20 years. Civilian per capita consumption of both butter and lard has been less than in 1944. Civilian butter supplies this year have been short because butter production was less than in 1944 or the prewar years 1935-39, and because Government procurement was large until August. Lard output this year will be more than 1 billion pounds below 1944 production. For the year as a whole, civilian per capita consumption of food fats and oils is estimated at 41.5 pounds including 10.7 pounds of butter, actual weight, 11.6 pounds of lard, and 19.2 pounds of other fats and oils (fat content basis). On the same basis, 44.7 pounds were consumed per civilian in 1944, and 48.0 pounds in 1935-39.

Butter supplies for civilians were particularly short in the early months of 1945 preceding the heavy milk production season. Requirements for

export were large, although smaller than in 1944. These exports were principally for the Russian Army, and together with the increased requirements for our own armed forces, necessitated heavy Government procurement, beginning in February and expanding in the season of flush butter production (May, June, July). However, civilian supplies gained somewhat from the increases in production, and the distribution of the available supply apparently improved. The required set aside of creamery butter for Government purchase was lowered from 50 percent in July to 20 percent in August and terminated on August 31. It has been announced that the Army is turning over 80 million pounds of butter to the Department of Agriculture for resale through commercial channels this fall and winter. The War Shipping Administration and the Commodity Credit Corporation are releasing another 17 million pounds. This quantity represents about 5 percent of the year's production and will be particularly helpful in offsetting the seasonal increase in butter production as well as the decrease apparently resulting from increased fluid cream marketings.

Civilian lard consumption in 1945 is indicated at 11.6 pounds per capita which is more than 15 percent below last year's rate of 13.9 pounds per person. Total production of lard in 1945 is now estimated at 2,100 million pounds, 35 percent below the record output of 3,215 million in 1944. About 135 million pounds of this year's supply is going into the manufacture of other products such as shortening and soap. Non-civilian takings out of the year's production and stocks are estimated at about 800 million pounds. Exports have been much smaller than in 1944, but military procurement, including that for relief feeding, has been larger. Total factory and warehouse stocks of lard and rendered pork fat amounted to 610 million pounds on September 1, 1944. They were down to 93 million pounds on September 1, 1945.

Tightness of lard and butter supplies has been reflected in increased pressure upon civilian supplies of margarine, shortening, and other edible fats and oils. Ration point values of all food fats and oils reached a wartime peak in mid-1945. Reductions were made after the termination of lend lease and the lowering of military requirements, and all food fats and oils will be rationed at 8 points per pound, effective October 28, 1945.

## FRUITS

### Outlook for 1946

Civilians are expected to have more fruit in 1946 than this year. Overall fruit production may be slightly larger than in 1945, assuming average weather conditions, especially because the next apple crop may be more nearly normal. Military procurement of canned fruit and fruit juices will be at least two-thirds less than this year. Imports of fresh fruits, particularly bananas and pineapples, probably will increase as much as one-fifth over 1945.

With some reduction in consumer purchasing power and with plentiful supplies of most other foods, civilian demand for fruits at present prices is expected to be smaller in 1946. Since total fruit supplies for civilians may be somewhat larger per person, fruit prices in general will be considerably lower than the high wartime levels.

Fruit items of major importance during the next 6 months or so are citrus, apples, pears, and processed fruits. A record-large citrus crop is in prospect. The 1945 commercial apple crop is indicated at 3,204 million pounds (66 million bushels), with the carry-over on January 1, 1946 perhaps one-third smaller than a year earlier. Indicated 1945 pack of canned fruits totals 43 million cases (equivalent cases of 24 No. 2-1/2 cans). Civilian supplies of canned fruits in the 1945-46 pack year may be about 15 pounds per capita, nearly equal to the 1935-39 average. Total fruit juice consumption in 1946 probably will reach a new record, perhaps as much as three times the 1935-39 average of 4 pounds. Supplies of frozen and dried fruit are likely to be much the same in 1946 as in 1945.

Review of 1945

The total fruit supply in 1945 has been nearly as large as last year. Total production has been slightly below the 1944 record crops, but large stocks of apples and pears were carried over on January 1, 1945 and imports of fresh fruit have increased about 40 percent from 1944. This year's crops of citrus, peaches, and pears have set new records. The apple and sour cherry crops were the shortest in many years. The apricot crop was much smaller than in 1944 although only slightly below average.

Civilian fruit supplies have varied considerably during the year. Supplies of apples, pears, and citrus were large in the early part of the year. By late spring other fresh fruits, particularly peaches, were plentiful. Several of the canned fruit juices were abundant, but pineapple juice and canned fruits were very short. Military needs amounted to about three-fifths of the 1944-45 pack of canned fruit. With the end of the war, military procurement from the 1945-46 packs of fruits and fruit juices was reduced drastically. Accordingly, ration points for all canned fruits and fruit juices were removed on August 15. Stocks of canned fruits from the old pack were short at that time, but the supply situation improved when supplies from the new pack became available. Apple supplies now are far below average and the carry-over at the end of the year will be very small.

For this year, average civilian consumption of fresh fruits is estimated at 146 pounds per capita, including 66 pounds of citrus, 22 pounds of apples, and 58 pounds of other fresh fruits. A small decrease in civilian consumption of citrus and a 5-pound drop in apple consumption, compared with 1944, are offset by somewhat larger consumption of other fresh fruits. Canned fruit consumption by civilians from the 1944-45 pack was about 9 pounds per person, 40 percent below prewar, but canned fruit juice consumption in 1945 reached a new record of 10.2 pounds per person, two and one-half times the prewar level.

Frozen fruit supplies for civilians have been slightly larger in 1945 than last year. Although the 1944-45 pack of dried fruits was smaller than in 1943-44, civilian consumption was slightly larger. This increase was made possible by withdrawals from stocks and by a decrease in exports.

## VEGETABLES

### Outlook for 1946

Plentiful supplies of vegetables, both fresh and processed, are expected in 1946. Production for the fresh market probably will continue high. With some reduction in consumer purchasing power and with increases in supplies of other foods, it is probable that vegetable prices will be lower than in 1945, but above prewar.

The 1945-46 pack of canned vegetables is estimated at 276 million cases of 24 No. 2's, somewhat larger than the 1944 pack. Civilian supplies may turn out to be the largest on record, perhaps 40 to 45 pounds per person.

A large carry-over from the bumper 1945 crop of potatoes is probable, and production next year may be large enough to cause severe problems in distribution. Civilian supplies of potatoes and sweetpotatoes will be plentiful through at least the first half of 1946, and lower prices are expected.

### Review of 1945

Total supplies of vegetables have been at a record high level in 1945. Larger production for the fresh market than the previous record of last year was absorbed by strong civilian demand. Although the supply of potatoes was somewhat short early in the year, this year's crop is of near-record size. Civilian supplies of canned vegetables from the 1944-45 pack were below full consumer demand at ceiling prices, but the drastic cutbacks in military procurement from the new pack will make abundant supplies available to civilians. Supplies of dry beans and peas and sweetpotatoes have been somewhat smaller than last year.

Civilian consumption of fresh vegetables in 1945, exclusive of supplies from town and city gardens, is estimated at 264 pounds per capita. This rate is slightly larger than that of 1944, but is 12 percent above average annual consumption in 1935-39. Civilians consumed only about 74 pounds of canned vegetables per capita from the large 1944 pack because about one-fourth of the supply went to fill military needs. With not more than one-tenth of the 1945-46 pack going to the armed forces, civilian supply has increased greatly since summer.

Decreases in military needs, together with substantial improvements in the potato and sweetpotato crops, have made potato supplies more than abundant and sweetpotatoes relatively plentiful. The Department of Agriculture purchased more than 4-1/2 million bushels of potatoes through October 10 in fulfilling legal price support commitments. Some of these potatoes have gone into supplemental food programs such as school lunches, some for starch production, some for livestock feeding at experiment stations, and some have been processed. However, substantial quantities had to go into storage temporarily, awaiting final disposition.

Crops of dry beans and peas this year are smaller than last year, 8 percent for dry beans and 35 percent for dry peas. Government stocks of these foods were relatively large at the beginning of the 1944 crop year, but shipments to liberated areas have practically exhausted the stocks. Apparently, civilian supplies have been fairly adequate in most areas until about the end of the 1944-45 crop year. Supplies from the new crops are now being marketed.

## FOOD GRAINS

### Outlook for 1946

Record crops of wheat, oats, and rice and another large corn crop will provide ample supplies of grains for domestic food and feed plus substantial amounts for export until the 1946 harvests. Furthermore, these crops probably will be large again next year. The 1945 crop and prospective 1946 crop of rye, however, are relatively small and will restrict use of this grain for distilled spirits and exports.

Civilian demand for cereal products in 1946 probably will vary little from present levels of consumption. Consumer incomes will be somewhat reduced, but there is some evidence that this ordinarily would cause the demand for cereal products to go up slightly rather than down. However, this factor probably will be more than offset in 1946 by decreases in the demand for cereal products as many other foods become plentiful. Only relatively small quantities are expected to be bought for direct use of the armed forces next year, but the need for imported supplies in Europe will be great, at least until the 1946 harvests.

As of October 1, the 1945 rice crop was indicated at 71.6 million bushels, which is 1.4 million bushels above the record in 1944. Prospective demands for military and civilian food in the Orient are very large, however, and civilian consumption in the United States in 1946 may fall slightly below the 1935-39 average of 5.7 pounds of milled rice per capita.

Smaller market supplies of corn from the 1945 crop are expected to prevent any increase in the use of corn for food. The demand for corn sugar and corn sirup in particular will continue strong, but supplies probably will be no larger on a per capita basis than in 1945. Consumption of other corn products and of oatmeal and barley food products is likely to remain at about the relatively high level of 1945.

### Review of 1945

Supplies of most cereal products have been plentiful throughout 1945, although rice, and bakery products using large amounts of fats and oils and sugar have been short of demand in some areas at least part of the year. Record food grain production last year and again this year assured the relatively plentiful supplies for food, as well as large quantities for export. High rates of consumption of cereal products in 1945 have been facilitated by relatively low prices. Retail prices of cereal products in 1945, as reported by the Bureau of Labor Statistics, have been only 9 percent above the 1935-39 average.

Civilian per capita consumption of wheat products has been high this year because plentiful supplies were available during a period of short supplies of many other foods and because over-all food demand was heavy. Military procurement of wheat and wheat products for use of the armed forces and

for relief feeding together with exports and shipments other than military may reach about 270 million bushels in 1945. Non-food uses of wheat is substantially smaller this year than in 1943 or 1944 as there were good supplies of other grains for feed and its use in alcohol production was curtailed.

Although rye production was much smaller in 1944 than the 1935-39 average, civilian consumption of rye flour this year (2.5 pounds) has been larger than in the prewar period, but smaller than in 1942-44. This decrease in domestic food use is believed to result from manpower shortages in bakeries as rye bread requires more labor than wheat bread. Substantial amounts of rye are being exported this year for use as food. Even with smaller non-food use, stocks at the end of the calendar year may be as much as 40 percent below beginning stocks.

Rice supplies for civilian consumption have been less than consumer demand in some parts of the country at times this year, despite the marketing of last year's huge rice crop. The armed forces have procured between 5 and 10 million bushels, rough rice equivalent, and 35-40 million are being exported from the 1944 crop, mostly to Caribbean and Pacific areas.

## SUGAR

### Outlook for 1946

Civilian sugar supplies per capita should be somewhat larger next year than in 1945, but will be less than the 1935-39 average of 96.5 pounds per person as well as considerably below full consumer demand at present prices. The increase in civilian supplies will result from an increase in total supplies and from sharp reduction in noncivilian needs.

Domestic sugar beet production in 1945 (most of which will be marketed in 1946) is expected to be more than one-third greater than in 1944, though slightly below the 1934-43 average. Sugar cane production in Louisiana and Florida this year is indicated to be about 16 percent above 1944, and one-fourth above the 10-year average. The $1.00 per ton increase in price support payments for 1946 crops of sugar beets and an equivalent increase for cane (including cane grown in Hawaii, Puerto Rico, and the Virgin Islands) should result in further increases in U. S. supplies in late 1946. Sugar production in Cuba is expected to be larger in 1946 as the drought which reduced the yield of the 1944-45 crop has broken. Production of beet sugar in Europe should increase during the next few years, as the industry recovers from the effects of the war. Some recovery of sugar production in Java and the Philippines is expected although it may be relatively slow. Exports from new production are likely to be negligible before 1947. If the new-found Java stocks are in good condition, they will add about 5 percent to world supplies in 1946. Their effect on the U. S. sugar situation will depend upon how much is allocated to this country directly, and upon their indirect influence in increasing the quantity of sugar which the U. S. may import from other sources.

Review of 1945

Civilian supplies of sugar in 1945 may total 73 pounds per capita (refined), compared to the 89 pound national average in 1944 and the 1935-39 average of 96.5 pounds.

Total U. S. supplies for 1945 included off-shore receipts of about 5,050,000 short tons, raw value, and U. S. production about 1,785,000 short tons. Military takings out of total U. S. sugar supplies have been about 200,000 tons larger than the 1 million tons purchased last year. Much of the increase was for relief feeding. The armed forces also procured some sugar directly from other world sources. Exports and shipments from total U. S. sugar supplies have amounted to less than 400,000 tons.

Because consumption in the first half of 1945 was at about the same rate as in the first half of 1944 despite a reduction in the total annual supply available, civilian consumption in the second half of 1945 may be at the annual rate of only 68 pounds per capita, compared with a rate of about 78 pounds for the first half of the year. Smaller imports, depletion of stocks in 1944 and the first half of 1945, and the increased need for sugar from the Western Hemisphere for liberated areas account for the shorter supply compared with 1944. The sugar situation for civilians will continue tight in the last quarter of 1945, although further decreases have been prevented by the reductions in military purchases following the end of the war.

World sugar supplies in 1945 are the smallest since the start of the war because of greatly reduced production in Europe, a smaller crop in Cuba in 1945 than in 1944, and small crops of sugar beets in the United States in 1943 and 1944. World sugar stocks were reduced about 2.4 million tons in 1943 and 1944, and a further decline of 1.2 million tons in 1945 was in prospect before the discovery of the stocks in Java.

## BEVERAGES

Outlook for 1946

Civilian consumption of coffee in 1946 may be slightly less than in 1945 but well above the 1935-39 average of 14 pounds per person. Civilian demand may decline as night shifts and other war activities cease. Military takings may decrease by 2/3.

Supplies of tea for civilians will be plentiful in 1946, and per capita consumption is expected to increase slightly over 1945. Military requirements will be much smaller than in 1945, and prospects are for larger imports.

Cocoa consumption by civilians might increase 15 to 20 percent next year as larger supplies become available. Better supplies of sugar and dairy products in 1946 are likely to raise civilian demand for chocolate and cocoa.

Review of 1945

Coffee consumption by civilians in 1945 is of record proportions, about 16.7 pounds per capita (green bean basis). Military takings in 1945 have been

larger than last year, partly due to purchases for relief feeding. To meet heavy demand, imports have been of record size.

Per capita consumption of tea by civilians in 1945 may be .66 pounds, which is more than in 1944 but still practically equal to the prewar (1935-39) average of about .67 pounds. Imports are about the same as in 1943 and 1944.

Consumption of cocoa by civilians in 1945 is expected to be about 3.9 pounds per capita, larger than in 1944. Military takings may be almost as large as in 1944. Imports are indicated at a record total of about 800 million pounds as a result of good production in South America and Africa, and strong total demand.

Table 4.—Production of major food commodities, calendar years, 1935-39 average, 1942, 1943, 1944 and 1945 with percentage comparisons 1/

| Commodity | Unit | Average 1935-39 | 1942 | 1943 | 1944 | Prel. 1945 | 1945 as a percentage of 1935-39 | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|---|---|---|
| Meats (dressed weight) | Mil. lb. | | | | | | | |
| Beef | " | 6,936 | 8,831 | 8,523 | 9,137 | 10,007 | 144 | 110 |
| Veal | " | 1,038 | 1,139 | 1,160 | 1,595 | 1,564 | 151 | 98 |
| Lamb and mutton | " | 871 | 1,045 | 1,104 | 1,023 | 1,018 | 117 | 100 |
| Pork (excluding lard) | " | 7,337 | 10,723 | 13,349 | 12,393 | 10,036 | 137 | 78 |
| Total meats | " | 16,182 | 21,738 | 24,136 | 24,548 | 22,625 | 140 | 92 |
| Poultry and Eggs | | | | | | | | |
| Eggs | Mil.doz. | 3,335 | 4,430 | 4,972 | 5,305 | 5,050 | 151 | 95 |
| Chicken (dressed weight) | Mil.lb. | 2,325 | 2,988 | 3,804 | 3,460 | 3,550 | 153 | 103 |
| Turkey (dressed weight) | " | 350 | 496 | 466 | 547 | 650 | 186 | 119 |
| Dairy Products | | | | | | | | |
| Total milk 2/ | " | 193,656 | 118,777 | 17,687 | 118,504 | 122,526 | 118 | 103 |
| Cheese 3/ | " | 669 | 1,112 | 993 | 1,009 | 1,140 | 170 | 113 |
| Cond. and evap. milk | " | 2,225 | 3,782 | 3,343 | 3,758 | 4,230 | 190 | 113 |
| Fluid milk and cream 4/ | " | 44,146 | 49,514 | 53,921 | 56,144 | 58,418 | 132 | 104 |
| Fats and Oils 5/ | | | | | | | | |
| Butter, farm & factory | " | 2,170 | 2,130 | 2,015 | 1,816 | 1,720 | 79 | 95 |
| Lard 6/ | " | 1,524 | 2,398 | 2,884 | 2,951 | 2,022 | 125 | 69 |
| Margarine (fat content) | " | 303 | 347 | 500 | 479 | 501 | 165 | 105 |
| Shortening | " | 1,529 | 1,300 | 1,438 | 1,364 | 1,428 | 93 | 105 |
| Other edible fats and oils 7/ | " | 575 | 1,067 | 1,272 | 1,123 | 972 | 169 | 87 |
| Total fats and oils | " | 6,201 | 7,242 | 8,109 | 7,733 | 6,643 | 107 | 86 |
| Fruits | | | | | | | | |
| Fresh: | " | | | | | | | |
| Citrus | " | 6,870 | 8,333 | 8,838 | 10,095 | 9,974 | 145 | 99 |
| Apples (commercial) | " | 4,384 | 4,052 | 3,107 | 4,181 | 2,400 | 55 | 57 |
| Other (excluding melons) | " | 4,847 | 4,896 | 3,568 | 5,053 | 5,331 | 110 | 106 |
| Total fresh | " | 16,101 | 17,281 | 15,513 | 19,329 | 17,705 | 110 | 92 |
| Processed: | " | | | | | | | |
| Canned fruit | " | 1,702 | 2,226 | 1,587 | 2,098 | 1,890 | 111 | 90 |
| Canned fruit juices | " | 321 | 859 | 1,390 | 1,606 | 1,713 | 534 | 107 |
| Frozen | " | 106 | 221 | 221 | 341 | 337 | 318 | 99 |
| Dried | " | 1,111 | 1,021 | 1,339 | 1,138 | 1,120 | 101 | 98 |

-- Continued

Table 4.-Production of major food commodities, calendar years, 1935-39 average, 1942, 1943, 1944 and 1945 with percentage comparisons 1/ Continued -

| Commodity | Unit | Average 1935-39 | 1942 | 1943 | 1944 | Prel. 1945 | 1945 as a percentage of 1935-39 | 1945 as a percentage of 1944 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 8/ | Mil. lb. | 30,498 | 34,161 | 31,672 | 34,243 | 35,483 | 116 | 104 |
| Canned 9/ | " | 4,084 | 6,830 | 6,236 | 6,355 | 6,852 | 168 | 108 |
| Frozen | " | 10/ 73 | 163 | 223 | 235 | 267 | 340 | 114 |
| Potatoes | " | 359 | 371 | 460 | 391 | 424 | 118 | 108 |
| Sweetpotatoes | " | 68 | 66 | 73 | 72 | 69 | 101 | 96 |
| Dry edible beans 11/ | " | 1,361 | 1,755 | 1,935 | 1,502 | 1,380 | 101 | 92 |
| Dry field peas 11/ | " | 230 | 676 | 1,000 | 800 | 521 | 227 | 65 |
| Canned soups | " | 685 | 840 | 675 | 890 | 885 | 129 | 99 |
| Canned baby foods | " | 48 | 165 | 234 | 306 | 360 | 750 | 118 |
| Sugar, raw basis | 1,000 short tons | 1,948 | 2,141 | 1,531 | 1,512 | 1,785 | 92 | 118 |
| Grains | | | | | | | | |
| Wheat | Mil. bu. | 759 | 974 | 841 | 1,079 | 1,150 | 152 | 107 |
| Rye | " | 44.9 | 57.7 | 30.5 | 25.9 | 27.3 | 61 | 105 |
| Rice | " | 49.8 | 64.5 | 64.8 | 70.2 | 71.6 | 144 | 102 |
| Corn | " | 2,316 | 3,132 | 3,034 | 3,228 | 3,078 | 133 | 95 |
| Oats | " | 1,045 | 1,350 | 1,138 | 1,166 | 1,584 | 152 | 136 |
| Barley | " | 239 | 429 | 324 | 284 | 277 | 116 | 98 |
| Peanuts | Mil. lb. | 1,229 | 2,212 | 2,184 | 2,111 | 2,260 | 184 | 107 |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year: canned fruits, canned vegetables, and dried fruits which are on a pack-year basis; potatoes and sweetpotatoes, on the basis of a year beginning July 1. 2/ The production of total milk for human consumption differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed to calves and milk produced off farms are usually of approximately equal volume. 3/ Excluding full skim, cottage, pot, and bakers' cheese. 4/ Fluid milk equivalent for fresh use. 5/ Fat content basis except for butter which is on an actual weight basis. 6/ Excluding amount used in manufactured products. 7/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products, and other minor uses such as fish canning. 8/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 9/ Includes asparagus, beans (lima) beans (snap), beets, carrots, corn, hominy, kraut, (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup, and chili sauce, mixed vegetables. 10/ Average 1937-39. Data prior to 1937 are not available. 11/ Cleaned basis.

Table 5.-Retail food prices and total consumer price index, United States, by months, 1943-45

(Index numbers 1935-39 = 100)

| Year and month | Meats | Eggs | Dairy products | Fats and oils | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and sweets | Beverages | All foods | Consumer price index |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| Jan. | 135 | 166 | 134 | 126 | 106 | 147 | 129 | 154 | 127 | 124 | 133 | 121 |
| Feb. | 136 | 144 | 136 | 126 | 106 | 153 | 131 | 156 | 127 | 125 | 134 | 121 |
| Mar. | 137 | 142 | 137 | 126 | 107 | 173 | 132 | 157 | 128 | 125 | 137 | 123 |
| Apr. | 138 | 141 | 137 | 127 | 108 | 191 | 132 | 158 | 128 | 125 | 141 | 124 |
| May | 138 | 142 | 137 | 126 | 108 | 206 | 131 | 158 | 128 | 124 | 143 | 125 |
| June | 138 | 146 | 134 | 126 | 108 | 202 | 130 | 158 | 126 | 124 | 142 | 125 |
| July | 131 | 154 | 133 | 126 | 108 | 193 | 130 | 159 | 126 | 124 | 139 | 124 |
| Aug. | 130 | 167 | 133 | 126 | 108 | 179 | 130 | 160 | 127 | 125 | 137 | 123 |
| Sept. | 130 | 178 | 134 | 126 | 108 | 176 | 130 | 160 | 127 | 125 | 137 | 124 |
| Oct. | 131 | 190 | 134 | 126 | 108 | 175 | 130 | 162 | 127 | 125 | 138 | 124 |
| Nov. | 130 | 191 | 134 | 125 | 108 | 170 | 130 | 162 | 127 | 125 | 137 | 124 |
| Dec. | 131 | 181 | 134 | 124 | 108 | 172 | 130 | 162 | 127 | 125 | 137 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Jan. | 131 | 154 | 134 | 124 | 108 | 175 | 130 | 163 | 127 | 124 | 136 | 124 |
| Feb. | 130 | 143 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Mar. | 131 | 135 | 134 | 124 | 108 | 171 | 130 | 163 | 127 | 124 | 134 | 124 |
| Apr. | 130 | 128 | 134 | 124 | 108 | 178 | 130 | 163 | 127 | 124 | 135 | 125 |
| May | 130 | 127 | 134 | 123 | 108 | 183 | 129 | 164 | 126 | 124 | 136 | 125 |
| June | 130 | 129 | 134 | 123 | 108 | 185 | 129 | 164 | 126 | 124 | 136 | 125 |
| July | 129 | 149 | 134 | 123 | 109 | 188 | 129 | 165 | 127 | 124 | 137 | 126 |
| Aug. | 129 | 159 | 134 | 123 | 108 | 187 | 129 | 165 | 126 | 124 | 138 | 126 |
| Sept. | 129 | 158 | 134 | 123 | 109 | 179 | 129 | 165 | 126 | 124 | 137 | 126 |
| Oct. | 129 | 179 | 134 | 123 | 109 | 170 | 130 | 166 | 126 | 124 | 136 | 126 |
| Nov. | 130 | 187 | 134 | 123 | 109 | 168 | 130 | 166 | 126 | 124 | 136 | 126 |
| Dec. | 130 | 188 | 134 | 123 | 109 | 164 | 130 | 166 | 126 | 124 | 137 | 127 |
| 1945 | | | | | | | | | | | | |
| Jan. | 130 | 170 | 134 | 123 | 109 | 178 | 130 | 167 | 126 | 124 | 137 | 127 |
| Feb. | 131 | 153 | 134 | 124 | 109 | 178 | 130 | 167 | 126 | 124 | 136 | 127 |
| Mar. | 131 | 141 | 134 | 124 | 109 | 179 | 130 | 167 | 126 | 124 | 136 | 127 |
| April | 131 | 140 | 134 | 124 | 109 | 183 | 130 | 168 | 126 | 125 | 137 | 127 |
| May | 132 | 141 | 134 | 124 | 109 | 195 | 130 | 169 | 127 | 125 | 139 | 128 |
| June | 132 | 145 | 133 | 124 | 109 | 208 | 130 | 169 | 126 | 125 | 141 | 129 |
| July | 132 | 157 | 133 | 124 | 109 | 207 | 130 | 169 | 126 | 125 | 142 | 129 |
| Aug. | 132 | 171 | 133 | 124 | 109 | 196 | 130 | 169 | 127 | 125 | 142 | 129 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

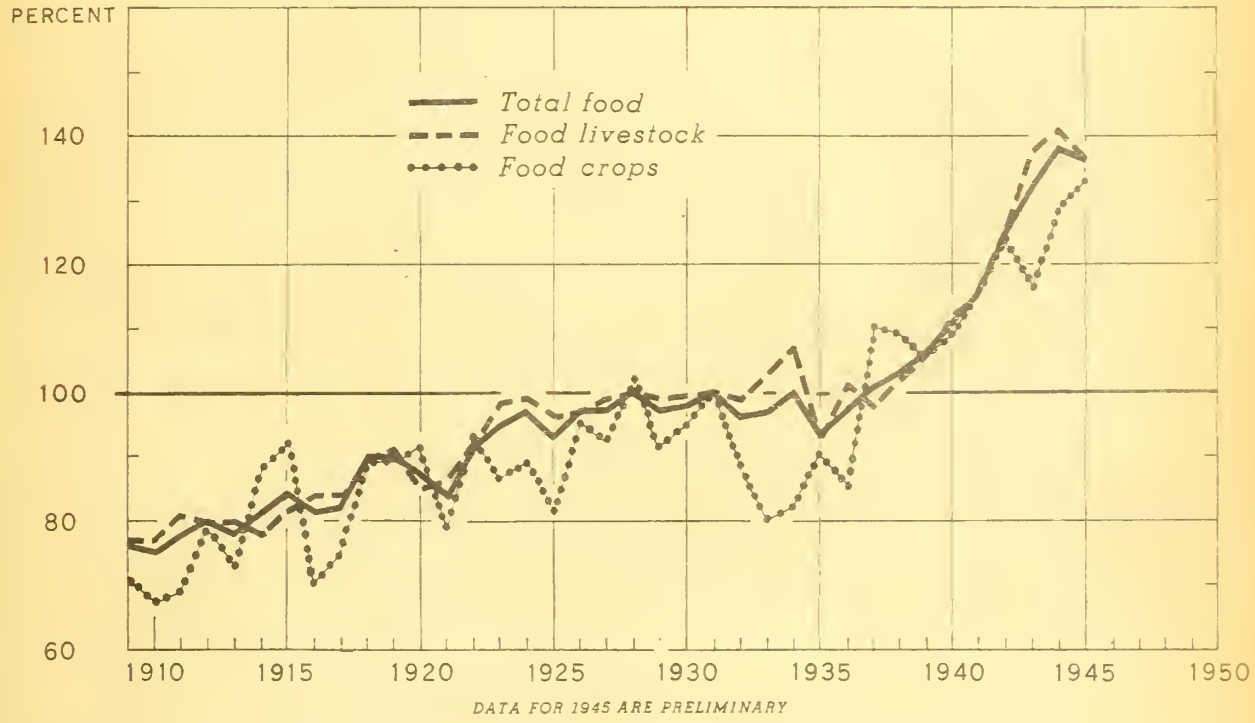
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 30 BAE NOVEMBER - DECEMBER 1945

## VOLUME OF AGRICULTURAL PRODUCTION FOR SALE AND FARM HOME CONSUMPTION: TOTAL FOOD, FOOD LIVESTOCK, AND FOOD CROPS, 1909-45

INDEX NUMBERS (1935-39=100)




U. S. DEPARTMENT OF AGRICULTURE NEG. 45723 BUREAU OF AGRICULTURAL ECONOMICS

The increase in the volume of food production during the 6 years 1939 to 1945 was nearly as large as that for the 30 years from 1909 to 1939. The wartime increase was due to intensified production efforts of farmers aided by favorable weather conditions over most of the country. The most significant gains were in wheat, truck crops and meat animals.

LIBRARY
CURRENT OFFICIAL RECORD
JAN 25 1946

# THE NATIONAL FOOD SITUATION

In This Issue


| | Page |
|---|---|
| Summary | 2 |
| Commodity Reviews | 3 |
| Wartime Changes in Food Consumption and Their Implications for Postwar Demand for Food: Part 1 | 9 |


## SUMMARY


Civilian food supplies will be at a near record level during the next few months, despite substantial exports of food. This results from the great reduction in military procurement. The total food supply continues much larger than in the prewar years.

Supplies of many foods are expected to meet civilian demand in full in most areas at or perhaps even below ceiling prices. Among these are most cereal products, citrus fruit, canned fruit juices, fresh and canned vegetables, evaporated milk, fluid milk, frozen fish, eggs, and potatoes. Some foods may be more plentiful than before the war, but still short of what civilians would like to buy. These include meats, cheese, and perhaps canned fruits. Supplies of sugar, fats, canned fish, apples, and bananas will continue to be smaller than the quantities consumed before the war.

In general, the changes in the civilian food supply situation during the next few months will be seasonal in character. Supplies of citrus fruit and canned fish are increasing, and there are seasonal decreases in such items as apples, pears, and poultry. On the other hand, civilian meat supplies may be reduced somewhat from the high December level by heavy procurement to meet the balance of fourth quarter export commitments as well as minimum current needs for export.

In comparison with civilian supplies per capita for the first half of 1945, the outlook for the coming months is much brighter. Supplies of only margarine, apples, and sugar will be shorter. Even after allowing for the larger number of people eating out of civilian supplies, there will be much more meat, fish, poultry, cheese, evaporated milk, bananas, canned fruits and vegetables, and potatoes for consumption than during the same months of 1945.

-- December 20, 1945

## COMMODITY REVIEWS

### Meats

Civilian meat supplies per capita in the next few months will be materially larger than in the same period last year but moderately smaller than current supplies. Meat supplies during the latter part of November and December have been large, because of heavy slaughter, reduced military takings, and also because Government procurement for export fell considerably below the scheduled program. Civilian demand for meats is so strong, particularly since the end of rationing on November 24, that procurement to fill Government needs has been difficult. Although all set asides were removed soon after the end of the war, they were reinstituted on the lower grades of beef and veal on October 14 and on the better grades of beef on December 16. All mutton came under set asides for the first time on October 14.

Meat production has increased seasonally in the last three months and will continue at a high level for the next five months. Federally inspected hog slaughter has accelerated from the summer and early fall rate, which was 40 to 50 percent below the comparable period of 1944. It was about as large in early December as the year before. Last spring's pig crop is now being marketed at relatively heavy weights. Much of the increased pork supplies have been going to civilians. Pork supplies will continue large, particularly in comparison with prewar quantities, until the seasonal declines next summer. However, supplies will not exceed demand at current prices.

Cattle slaughter set new records for the month in October and November. Calf slaughter has been large, but somewhat smaller than last year. The high level of cattle and calf slaughter is expected to continue. Sheep and lamb slaughter has been running below last year, and in November it was down from October. Lamb and mutton production in the next four or five months probably will continue smaller than last year's production, although there will be nearly as many fed lambs marketed as a year ago.

Reductions in the military procurement of meats have resulted in materially increased civilian supplies. Procurement of meat for the armed forces in the next three months is not likely to exceed one-third of the quantity taken in the first quarter of 1945. Further decreases in procurement will occur as demobilization continues.

In contrast, the procurement of meat for export in the first quarter of 1946 is scheduled to be at least half again as large as in January-March 1945, when it totaled over 380 million pounds, dressed meat basis. The total allocation of meat for foreign shipment in October-December 1945 was 1,114 million pounds (dressed meat basis). Of this quantity, 382 million pounds were to go to UNRRA and small quantities to other claimants out of surplus Army stocks. About 54 million pounds were for commercial exports and shipments. The remaining 600 to 650 million pounds for shipment were to be filled by Army contracts for canned meat turned over to the Department of Agriculture (about 100 to 150 million pounds), new contracts, and by a small quantity from stocks. Procurement has fallen about 200 million pounds below allocations for the fourth quarter. This deficit is scheduled to be made up by purchases in the next 3 months in addition to 425 million pounds to meet the first quarter allocation announced on December 13.

Total stocks of meat in cold storage on December 1, 1945 were slightly smaller than on the same date a year earlier. Government holdings included were about the same.

The schedule has been announced for the end of "rollback subsidies" to slaughterers of meat animals and for the end of producer subsidies paid to farmers for cattle, sheep, and lambs sold for slaughter. The $1.30 per 100 pounds, liveweight "rollback subsidy" on pork is scheduled to be withdrawn on March 31, 1946. The remaining 40 cent per 100 liveweight subsidy on hogs is expected to be withdrawn by next July 1 as well as all other subsidies on meats, except special payments to non-processing slaughterers of cattle. On a retail basis, the subsidies now in effect amount to 4 cents per pound on all meats and lard, averaging 2.6 cents for pork and lard, 5 cents on beef, and 7.7 cents per pound of lamb (the maximum seasonal rate). Although wholesale and retail ceiling prices on meat may be increased when the subsidies are dropped, the average level of retail meat prices is not likely to rise after mid-1946. Higher prices are forecast for the better grades of beef, lamb, and pork, but these probably will be offset by lower prices for the lower grades and less desirable items, particularly if the export demand for them declines.

Fish

Abundant supplies of fresh and frozen fish will be available for civilians in the next few months. Current stocks of frozen fish are the largest in history, and most of the holdings at this time of year are usually moved into distribution channels before April when the seasonal increase in fresh supplies begins. Civilian per capita consumption of fresh and frozen fish in the first few months of 1946 may be higher than in the comparable period before the war, although the rate of fish consumption will be affected by the supplies and relative prices of fish, meats, poultry, and eggs.

Canned fish supplies for civilians are expected to be larger this winter and spring than at any time during the war, primarily as a result of decreased military needs. However, they will still be less than prewar. The bulk of the seasonal pack has been completed, and set-aside requirements for export and military use have been largely satisfied. Shipments to the civilian market in the past few weeks have been relatively large. Per capita civilian consumption in 1945-46 may average about 3.2 pounds, compared with the 1935-39 average of about 5 pounds.

Poultry and Eggs

Near record supplies of chicken meat have been available for civilian consumption during the past three months. It is expected that they will continue at a near record level. Last spring, when WFO-119 was in effect in the commercial broiler producing areas of Delaware, Maryland and Virginia, civilian supplies of chicken were greatly reduced by military procurement. Stocks of chicken are very large, the highest on December 1 in the 35 years that records have been kept. Most of these are in commercial hands. The large stocks are indicative of heavy marketings, since the demand for chicken is still strong. Commercial broiler production is at a record level and slaughter of chickens in the first 6 months of 1946 will continue high. Military procurement of chicken meat has been greatly reduced in the past few months. The prospects for demand for chicken meat for the rest of the winter and early spring are good, particularly because of the fact that red meat supplies will be somewhat less than demand.

Consumption of turkey this fall and early winter has set a new record. This has been possible because of record production and reduced military takings. Production of turkeys in 1945 is over 20 percent larger than the previous record for 1944. The off-season of turkey consumption is about to begin and cold storage stocks are very high. On December 1 they were more than three times as large as for the same date just before the war. Of course, large quantities of turkey were consumed over the holidays. In addition to commercial cold storage stocks an unusually large number of breeder hens will be on farms on January 1. Practically all of these will be slaughtered in the spring at the end of the hatching season. The demand for turkey meat in this off-season is expected to be maintained because of heavy institutional use of turkey. Turkey has become a rather popular year rouhd item for restaurants and hotels.

Egg supplies for civilian consumption will continue large in the next 6 months. Production will be much the same as in the first half of 1945. Nearly 2300 million dozen were consumed by the civilian population in January-June, 1945, an annual rate of over 400 eggs per capita, while prices remained at ceilings. In 1946 the civilian demand for eggs will continue strong, although somewhat below 1945 when consumer income was at a record level and meat supplies were very short. However, this spring, egg supplies will exceed demand at the support price level of 90 percent of parity unless export purchases materially exceed present expectations.

Dairy Products

Civilian supplies of dairy products except butter are at a near record rate for this season of the year although less than demand in some areas. Milk production has decreased more than seasonally although it is still at a high level, a larger proportion of the total milk supply is going into the fluid milk and cream market, because of the higher financial return for milk marketed in the fluid form than for use in manufactured products. All national restrictions on the production and distribution of dairy products were removed by November 24th. Demand for all dairy products continued very strong and the total milk supply is not large enough to meet all demands.

The lifting of the War Food Orders controlling sales of cream has resulted in a more than seasonal decrease in butter production and to a lesser extent in decreased production of American Cheddar cheese, and evaporated milk. Creamery butter production is expected to continue 10 to 15 percent below the comparable months of 1945 for the rest of the winter and early spring. Practically all of the butter made available from military and other government stocks for supplementing civilian supplies from current production was inspected and sold to the trade before December 15. Butter supplies for civilians in January-March may be no larger than a year earlier, when supplies were at the lowest level in many years. By spring, however, civilian supplies are expected to exceed the 1945 rate.

Cheese supplies are larger now then they were during most of the war but will continue to be below full civilian demand until the flush production season begins next April. It is expected that aged or sharp cheese will become available soon after the first of the year, as the change in OPA price ceilings last summer takes effect. Evaporated milk supplies will remain plentiful. Civilian demand at ceiling prices will be met in full and large quantities will be available to meet export requirements. Military takings of evaporated milk in the next 6 months may be no more than 10 percent of the quantities taken in the first half of 1945.

Fats and Oils

Civilian supplies of food fats and oils in the first half of 1946 are likely to be moderately larger than a year earlier. Although the supply of butter may be slightly larger on a per capita basis for the period January-July 1946 as a whole, the supply of margarine probably will be smaller. Supplies of lard per capita may be about the same, but larger supplies of shortening and other edible oils are indicated.

Less butter will be available for civilians during January-March because of the sharp decline in production. By spring, however, the decrease in creamery butter production, compared with last year, will be more than offset by smaller Army procurement of butter.

Civilian supplies per capita of lard in January-June 1946 may be about the same as in January-June 1945. The total output of lard in the first 6 months of 1946 may be about 15 percent above the comparable period in 1945, when 1,070 million pounds were produced. Hog slaughter and lard production will be relatively heavy this winter and spring. The 1945 spring pig crop is being marketed late, so that an unusually large percentage of the crop will be slaughtered in the winter and early spring. In the late spring and early summer, hogs from the 1945 fall crop, which was larger than the 1944 fall crop, will come to market. Therefore, increased lard production is expected. However, stocks of lard at the beginning of 1946 may be less than 100 million pounds compared with 450 million pounds on January 1, 1945. Military requirements are substantialy smaller than last year. Total exports of lard in the first half of 1945 amounted to about 460 million pounds. From January 1 to July 1 of that year stocks of lard decreased over 300 million pounds. Export requirements for the first half of 1946 are indicated to be somewhat over 300 million pounds, but stocks are at an operating minimum. Therefore, practically all of the export requirements, as well as supplies for civilian and military consumption, will have to come out of current lard production.

Total civilian supplies of edible fats and oils for consumption in the form of margarine, shortening, cooking and salad oils in the first half of 1946 will be larger than in the comparable period of 1945. Less margarine will be available than last year, but the supplies in the other forms will be larger, on the basis of present quotas of oils and fats for the manufacture of these products. Stocks of cottonseed, soybean, corn and peanut oils on October 1, the seasonal low, were at about the 1937-41 average for that date. Production of cottonseed oil in the first half of 1946 will be substantially reduced from a year earlier, as a result of the exceptionally small 1945 cottonseed crop. The output of soybean, corn, and peanut oils probably will be about the same in total as in January-June 1945.

Fruits

Fruit supplies for civilian consumption will continue large during the next few months. A record large crop of citrus fruit will offset the very short apple supplies. More processed fruit will be available, but canned fruits will be quite short of full consumer demand at present prices. Most canned fruit juices will be plentiful. Frozen and dried fruit supplies will be much the same as last winter and spring.

Military procurement of apples has taken a much larger part of the total supply than last season. Canned fruit procurement has been greatly reduced. Takings from the 1945-46 pack may be no more than one-third the quantity taken during the previous pack year. Procurement of canned fruit juices for the armed forces is also much smaller.

The record citrus crop in prospect for 1945-46 results primarily from the 21 percent increase in grapefruit production over the 1944-45 crop, which was greatly reduced by the Florida hurricane. Early and midseason orange production is indicated to be slightly larger than last winter.

This year's crop of apples was only about half of the 1944 crop and of the average production for the period 1934-43. Stocks in cold storage on December 1 were a little more than 50 percent of the quantity held the year before. Furthermore, the short crop in Canada will permit only a few apples to be imported from there. In 1944-45, about 3,000 carloads of apples came in from Canada. This year's pear crop was a little larger than in 1944 and 15 percent above the 10-year average. However, cold storage holdings on December 1 were about the same as the previous year. Cold storage stocks of grapes are much the same as last year.

The outlook for imports of bananas is better than at any time during the war. Boats are available, and large supplies have been coming in. Imports are limited, however, by the smaller than prewar production in Central America and the Caribbean. Plantations have been somewhat neglected during the war, but they are now being restored.

Some canned fruits, such as peaches and apricots, will be relatively plentiful for civilian consumption. Pear supplies will be about as large as in the prewar period, but less than demand. Pineapples will be quite short until next spring. More grapefruit juices will be available this year than last; about the same quantity of orange juice and blends, but much less grape juice. Among the dried fruits, raisins will be somewhat short because of the smaller quantities dried last summer and fall.

Sugar

Civilian sugar supplies will continue to be as short in the next two or three months, at least for the country as a whole, as they were in the second half of 1945. The areas of the country usually dependent at this time of the year on domestic beet and cane production will have somewhat more sugar available than the eastern areas which ordinarily depend on stocks of imported sugar, because supplies in Puerto Rico and Cuba are small and stocks of these sugars in the United States are at a very low level. Cuban sugar mills begin grinding in January and little of the new crop supplies is ordinarily delivered to civilians in the United States until the second quarter .

Total domestic production of sugar, both cane and beet, in 1945, is estimated at one-fourth more than the 1944 output. Less cane sugar is available from Lousiana than anticipated earlier, because of larger syrup production and below average yield of sugar per ton of cane. The total supply of sugar for distribution in the first quarter of 1946 is estimated at 1.2 million tons, raw basis. This is one-third less than in the comparable period of 1945. However, the impact on civilians of this smaller supply is reduced by the fact that not more than 7 percent of the total will be going to noncivilian claimants in the next 3 months, compared with 25 percent in January-March 1945. The current household ration of sugar is 5 pounds per person every 4 months. Less sugar will be available for industrial users than last winter and spring, but it is expected that the supplies for such use will continue at approximately the level of the past few months.

The acute world sugar shortage is expected to ease only slightly during the coming year. Recovery of production in the Philippines and Java probably will be slow. Very little progress has been made in rehabilitating the industry in either area up to the present time. Political complications in Java have prevented the export of accumulated stocks. European beet sugar production was very short in 1945, and much larger imports than usual are necessary to maintain even the low wartime rations.

Food Grains

The record crop of wheat this year assures plentiful supplies for domestic food use as well as very large supplies for export. According to present indications, total wheat and flour exports from July 1 to the end of December will amount to about 175 million bushels. If transportation and procurement problems are met, it may be possible to export the equivalent of an additional 225 million bushels before next harvest. European demand is very great. Most of the exported wheat is being sent to Europe, and in addition, UNRRA will procure substantial quantities for China. Minimum Japanese requirements are being discussed. The

United States has enough wheat to meet domestic food and seed needs in full and to export theequivalent of 225 million bushels in the January-June period, and still have a carry-over next July of perhaps 175 million bushel , somewhat below the 235 million bushels average for 1932-41.

The 1945 rye crop was comparatively small, and although it will be large enough to supply all food needs, use of rye for distilled spirits and export are considerably restricted. The corn crop was of near record size. However, with the moisture content very high, because the crop matured late, market supplies of merchantable corn are much less than the demand for feed grain, processing, and export. Not more than 20 million bushels will be exported, most of it in the next 2 or 3 months, and this will be for food use only.

This year's rice crop was 2 million bushels above the 1944 record. Despit this tremendous crop, urgent relief needs in the Orient are so great that domestic civilian supplies may be no larger than in the prewar years, a little less than 6 pounds per person.

## Wartime Changes in Food Consumption and their Implications for Postwar Demand for Food 1/

### Part I. Over-all Food Supplies and Consumption

Civilian food consumption per person in the United States increased considerably during the war, despite the necessity of supplying huge quantities of food to our armed forces and allies. This was accomplished through a large expansion of food production (See cover chart and Table 1). By 1941, the volume of food production for sale and farm home consumption had risen to 15 percent above the average of the years 1935-39 and thereafter it increased steadily to attain steadily to attain a record level in 1944 38 percent above prewar. This expansion of production occured in the face of a decrease in the farm labor force and was aided by unusually favorable weather throughout most of the country. The greatest increases in food production were in livestock products, wheat, and truck crops.

During the prewar years 1935-39, about 97 percent of each year's supply of food was consumed domestically, and about 3 percent was exported. The percentage of the total food supplies consumed by civilians during the war declined to about 80 percent (Chart A). In 1942, the first full year of our participation in the war, about 7 percent of the available food supply went to the armed forces, and another 6 percent was exported, principally under Lend-Lease. Government stocks of food were built up both in 1942 and 1943. For 1943, military takings had increased to 12 percent and exports to 8. During 1944 and 1945, about 13 percent went to the armed forces and 7 percent to export. In these years, the Government stocks which had been built up in 1942 and 1943 were considerably depleted and were quite small at the beginning of 1946. From the beginning of 1945 until the end of the war the armed forces were taking almost one-fifth of the total food supply and other Government purchases were still large. With

1/ This is the first article in a series discussing various aspects of wartime food consumption.

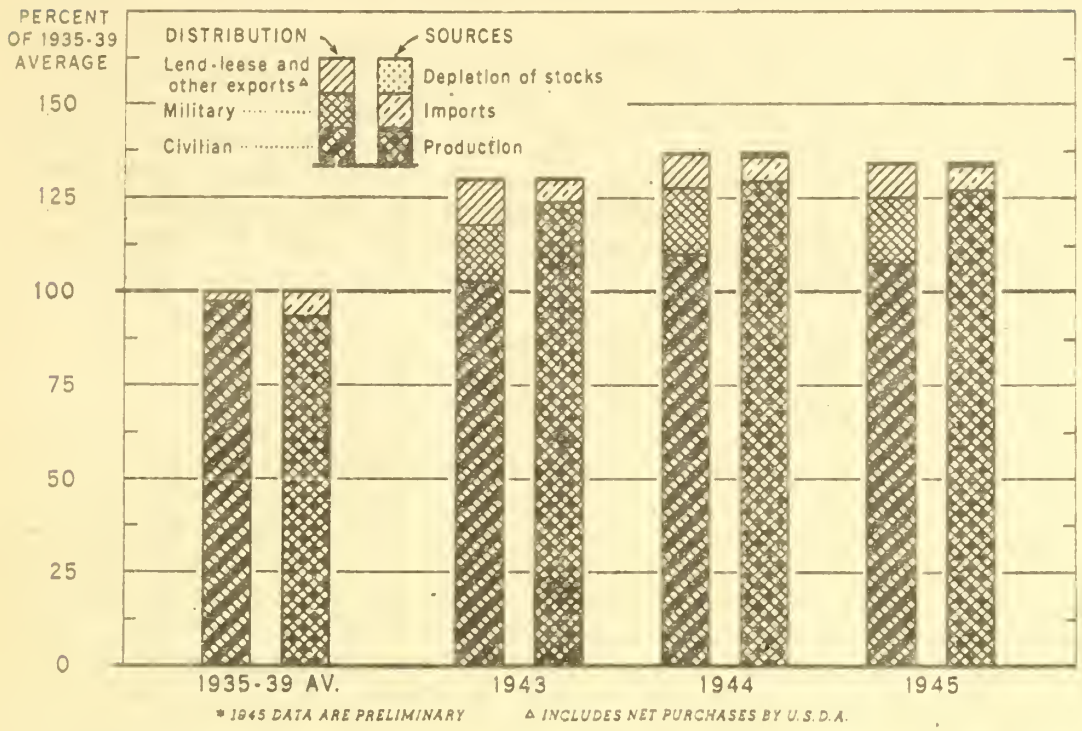
Table 1.- Volume of agricultural food production for sale and for farm home consumption, 1909 - 1945

(Index numbers 1935-39 = 100)

| Year | Food crops | | | | | | Food livestock | | | | Total food production |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Food grains 1/ | Truck crops 2/ | Fruits and tree nuts 3/ | Vegetables (excluding truck crops) 4/ | Sugar crops 5/ | Total food crops 6/ | Meat animals 7/ | Poultry and poultry products 8/ | Dairy products 9/ | Total food livestock | |
| 1909 | 98 | 31 | 52 | 93 | 71 | 71 | 92 | 68 | 63 | 77 | 76 |
| 1910 | 88 | 31 | 54 | 84 | 73 | 67 | 88 | 73 | 65 | 77 | 75 |
| 1911 | 85 | 31 | 66 | 76 | 80 | 69 | 94 | 78 | 65 | 81 | 78 |
| 1912 | 105 | 35 | 70 | 95 | 70 | 79 | 92 | 75 | 66 | 80 | 80 |
| 1913 | 106 | 34 | 54 | 82 | 77 | 73 | 92 | 74 | 67 | 80 | 78 |
| 1914 | 129 | 36 | 78 | 87 | 71 | 88 | 88 | 74 | 68 | 78 | 81 |
| 1915 | 147 | 35 | 73 | 85 | 73 | 92 | 92 | 78 | 70 | 82 | 84 |
| 1916 | 89 | 36 | 66 | 70 | 79 | 70 | 98 | 75 | 70 | 84 | 81 |
| 1917 | 89 | 39 | 57 | 100 | 94 | 75 | 98 | 73 | 72 | 84 | 82 |
| 1918 | 132 | 45 | 62 | 91 | 96 | 89 | 110 | 74 | 71 | 90 | 90 |
| 1919 | 140 | 42 | 64 | 82 | 83 | 89 | 108 | 80 | 74 | 91 | 90 |
| 1920 | 126 | 51 | 76 | 91 | 98 | 91 | 99 | 78 | 72 | 85 | 87 |
| 1921 | 118 | 43 | 49 | 83 | 95 | 78 | 96 | 80 | 75 | 86 | 84 |
| 1922 | 124 | 57 | 80 | 99 | 74 | 93 | 105 | 86 | 77 | 92 | 92 |
| 1923 | 104 | 56 | 82 | 93 | 75 | 86 | 113 | 91 | 80 | 98 | 95 |
| 1924 | 119 | 66 | 74 | 90 | 72 | 89 | 115 | 91 | 83 | 99 | 97 |
| 1925 | 95 | 74 | 74 | 79 | 73 | 81 | 107 | 93 | 85 | 96 | 93 |
| 1926 | 119 | 71 | 96 | 85 | 70 | 95 | 105 | 97 | 87 | 97 | 97 |
| 1927 | 125 | 74 | 70 | 96 | 72 | 92 | 105 | 102 | 88 | 99 | 97 |
| 1928 | 129 | 76 | 95 | 100 | 69 | 102 | 107 | 101 | 90 | 100 | 100 |
| 1929 | 113 | 87 | 73 | 90 | 74 | 91 | 103 | 100 | 93 | 99 | 97 |
| 1930 | 109 | 91 | 89 | 90 | 85 | 95 | 100 | 106 | 94 | 99 | 98 |
| 1931 | 114 | 83 | 98 | 98 | 78 | 100 | 103 | 101 | 96 | 100 | 100 |
| 1932 | 92 | 79 | 82 | 100 | 88 | 88 | 101 | 99 | 97 | 99 | 96 |
| 1933 | 69 | 76 | 81 | 93 | 100 | 80 | 108 | 100 | 98 | 103 | 97 |
| 1934 | 64 | 88 | 86 | 101 | 82 | 82 | 117 | 96 | 98 | 107 | 100 |
| 1935 | 81 | 92 | 95 | 104 | 89 | 91 | 90 | 92 | 98 | 93 | 93 |
| 1936 | 79 | 96 | 81 | 88 | 94 | 85 | 103 | 99 | 99 | 101 | 97 |
| 1937 | 115 | 102 | 113 | 107 | 96 | 110 | 96 | 101 | 99 | 98 | 101 |
| 1938 | 124 | 104 | 100 | 102 | 114 | 109 | 102 | 101 | 102 | 102 | 103 |
| 1939 | 101 | 106 | 111 | 99 | 106 | 105 | 109 | 108 | 102 | 106 | 106 |
| 1940 | 110 | 111 | 110 | 101 | 104 | 109 | 118 | 109 | 105 | 112 | 111 |
| 1941 | 131 | 116 | 113 | 100 | 97 | 116 | 118 | 116 | 110 | 115 | 115 |
| 1942 | 139 | 129 | 117 | 104 | 110 | 124 | 132 | 131 | 114 | 126 | 125 |
| 1943 | 116 | 124 | 107 | 125 | 81 | 116 | 150 | 152 | 113 | 138 | 132 |
| 1944 | 148 | 135 | 123 | 106 | 82 | 129 | 155 | 153 | 116 | 141 | 138 |
| 1945 10/ | 158 | 140 | 118 | 111 | 96 | 133 | 141 | 153 | 120 | 136 | 136 |

1/ Wheat, rye, rice, and buckwheat.
2/ For fresh consumption, (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes and watermelons) and for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach and tomatoes).
3/ Apples, peaches, pears, grapes, cherries, apricots, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried figs, plums, dried prunes, almonds, walnuts and pecans.
4/ Dry edible beans, white potatoes and sweetpotatoes.
5/ Sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, and maple sugar and sirup.
6/ Includes peanuts in addition to the other crops.
7/ Cattle and calves, beef and veal, hogs, pork and lard, sheep and lambs, and lamb and mutton.
8/ Chicken eggs, commercial broilers, chickens and turkeys.
9/ Farm butter, butterfat, milk sold at wholesale, milk retailed by farmers and milk equivalent of dairy products consumed on farms.
10/ Preliminary.

# TOTAL UNITED STATES FOOD DISAPPEARANCE: DISTRIBUTION AND SOURCES, 1935-39 AVERAGE, 1943, 1944, AND 1945*




U S DEPARTMENT OF AGRICULTURE NEG. 46102 BUREAU OF AGRICULTURAL ECONOMICS

The total disappearance of food produced in or imported into the United States was a third higher in 1945 than in 1935-39. Nearly all of this increase in disappearance was made possible by larger production. Commercial stocks were reduced by 1945 from the high level of 1941, and this reduction more than offset the decrease in food imports from prewar. About 20 percent of the 1945 food disappearance consisted of takings by the armed forces and lend-lease and of exports and shipments (2/3 of that quantity went to the armed forces and 1/3 to other noncivilian food uses). The remaining 80 percent was taken by civilians.

Total food disappearance: Source and distribution, average 1935-39, annual 1940-45 1/

| Year | Percentage of food disappearance in each year | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Source of total food | | | | | Distribution by claimants | | | | | | |
| | Total food disappearance | Food production | Imports | Reduction in stocks | Increase in stocks | Civilian | Military, including military relief feeding | Department of Agriculture 2/ Net purchases | Department of Agriculture 2/ Shipments | Department of Agriculture 2/ Reduction in stocks | Department of Agriculture 2/ Increase in stocks | Commercial exports and shipments 3/ |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.5 | 6.0 | | .5 | 93.7 | 2.1 | 2.5 | 2.3 | | .2 | 1.7 |
| 1942 | 100.0 | 94.1 | 3.8 | 2.1 | | 86.3 | 6.5 | 6.2 | 5.2 | | 1.0 | 1.0 |
| 1943 | 100.0 | 95.3 | 4.9 | | .2 | 78.9 | 11.7 | 8.1 | 7.1 | | 1.0 | 1.3 |
| 1944 4/ | 100.0 | 94.5 | 4.8 | .7 | | 80.3 | 12.7 | 5.8 | 6.5 | .7 | | 1.2 |
| 1945 4/ | 100.0 | 94.9 | 4.8 | .3 | | 80.4 | 13.3 | 4.6 | 5.8 | 1.2 | | 1.7 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 114.1 | 107.8 | 6.9 | | .6 | 106.9 | 2.4 | 2.8 | 2.6 | | .2 | 2.0 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.4 | 8.1 | 7.8 | 6.6 | | 1.3 | 1.3 |
| 1943 | 129.7 | 123.7 | 6.3 | | .3 | 102.3 | 15.2 | 10.5 | 9.3 | | 1.2 | 1.7 |
| 1944 4/ | 136.8 | 129.3 | 6.6 | .9 | | 109.9 | 17.4 | 7.9 | 8.8 | .9 | | 1.6 |
| 1945 4/ | 133.4 | 126.5 | 6.5 | .4 | | 107.2 | 17.8 | 6.1 | 7.7 | 1.6 | | 2.3 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipment out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks are included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 and 1945, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture. 4/ Preliminary.

the end of the war, however, military cutbacks changed the whole food supply picture and permitted immediate increases in the civilian supplies of many foods, particularly for the last quarter of 1945.

Because of the increase in total food supplies which, by 1944, were about 37 percent above prewar, the decreasing share of the total supply going to civilians did not result in a lowering of the average per capita consumption of food by civilians. In fact, on a per capita basis, over-all civilian food consumption averaged well above the 1935-39 level throughout the war (chart B). The index of civilian per capita food consumption, in which retail prices in 1935-39 are used as constant weights to combine the various foods, was as follows:

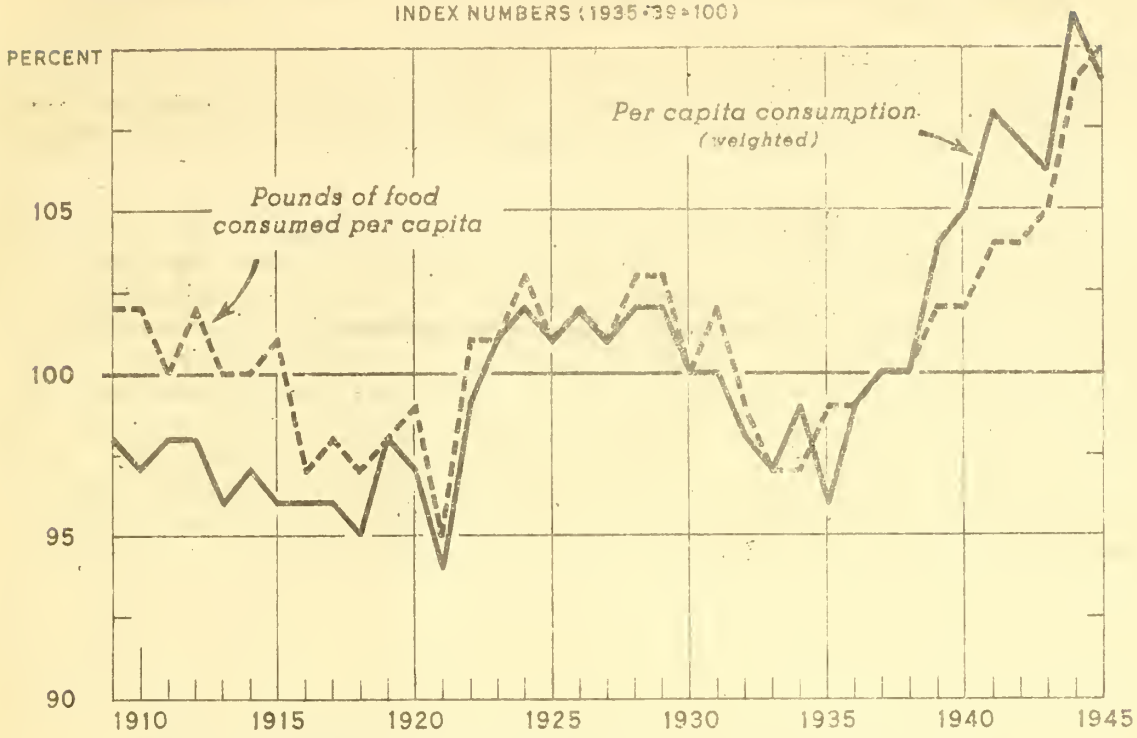
| | | | |
|---|---|---|---|
| 1935-39 | 100 | 1943 | 106 |
| 1941 | 108 | 1944 | 111 |
| 1942 | 107 | 1945 | 109 |

It is apparent that 1943 was the low year during the war for civilian food supplies in the United States. In that year, military and other Government purchases made the deepest inroads into the total food supply. Record food production in 1944, combined with smaller exports, largely because of shipping shortages, made possible a record civilian per capita food consumption at the peak of the war effort. The average for the year 1945 was almost as high as the 1944 record. However, there was disparity between the period before and after the end of the war. Prior to VJ-Day, civilian per capita consumption for the year 1945 was expected to be only 5 percent above prewar. After the end of the war, civilian supplies of many foods increased markedly, permitting a much higher level of consumption in the last 3 or 4 months of the year. As a result, the average rate of per capita consumption for the year 1945 is now estimated at 9 percent above prewar. The changes in wartime food consumption on a retail poundage basis are much the same as the results when price weights are used to combine the several foods. The variations between the two measures of food consumption, on a year to year basis, are due to shifts in the consumption of foods with higher prices per pound, such as meat, sugar, and processed foods.

Although average civilian per capita consumption was above the peacetime level during the war years, combined civilian, military and export demands exceeded total supplies from 1942 on. During the years 1942 to 1944, it is estimated that total food supplies were 5 to 10 percent less than necessary to fill the total demands for food under price controls. Supplies were shortest relative to demand during the period extending from the latter part of 1944 until August 1945. This coincided with the final war effort in Europe, the provision of supplies for liberated areas, and the extension of the food pipelines in the Pacific. By 1945, the gap between supplies and demand appears to have been as high as 13 to 17 percent. Much of the demand for food for export was effective

# PER CAPITA CONSUMPTION OF FOODS*, 1909-45

INDEX NUMBERS (1935-39=100)




* AVERAGE FOR TOTAL POPULATION, 1909-40; AVERAGE FOR CIVILIAN POPULATION 1941-45
DATA ON MILITARY CONSUMPTION 1917-19 ARE NOT AVAILABLE.

U. S. DEPARTMENT OF AGRICULTURE NEG. 43786 BUREAU OF AGRICULTURAL ECONOMICS

Although the per capita consumption of foods in terms of pounds tends to remain fairly stable, the index of consumption weighted by the average retail prices of foods during the base period, 1935-39, has shown an upward trend. This fact is accounted for by the shift from cheaper foods, such as potatoes and grain products, to the more expensive types, such as dairy products, fruits and vegetables. The nutritional analysis of the national average diet indicates that a general improvement in the nutritive content has accompanied these shifts.

The data presented in the above chart do not include the estimated production of vegetables in city victory gardens. If such production were included, the weighted index would be one point higher in 1943, 1944 and 1945.

Per capita consumption of foods (retail weight) 1909-45 1/
(Index numbers 1935-39 = 100)

| Year | Per capita consumption weighted 2/ | Pounds of food consumed | Year | Per capita consumption weighted 2/ | Pounds of food consumed |
|---|---|---|---|---|---|
| 1909 | 98 | 102 | 1927 | 101 | 101 |
| | | | 1928 | 102 | 103 |
| 1910 | 97 | 102 | 1929 | 102 | 103 |
| 1911 | 98 | 100 | | | |
| 1912 | 98 | 102 | 1930 | 100 | 100 |
| 1913 | 96 | 100 | 1931 | 100 | 102 |
| 1914 | 97 | 100 | 1932 | 98 | 99 |
| 1915 | 96 | 101 | 1933 | 97 | 97 |
| 1916 | 96 | 97 | 1934 | 99 | 97 |
| 1917 | 96 | 98 | 1935 | 96 | 99 |
| 1918 | 95 | 97 | 1936 | 99 | 99 |
| 1919 | 98 | 98 | 1937 | 100 | 100 |
| | | | 1938 | 100 | 100 |
| 1920 | 97 | 99 | 1939 | 104 | 102 |
| 1921 | 94 | 95 | | | |
| 1922 | 99 | 101 | 1940 | 105 | 102 |
| 1923 | 101 | 101 | 1941 | 108 | 104 |
| 1924 | 102 | 103 | 1942 | 107 | 104 |
| 1925 | 101 | 101 | 1943 | 106 | 105 |
| 1926 | 102 | 102 | 1944 | 111 | 109 |
| | | | 3/1945 | 109 | 110 |

1/ Consumption for total population 1909-40; civilian only, beginning 1941. Estimates of military consumption for the period of World War I are not available. 2/ Weighted by average retail prices in the base period 1935-39. 3/ Preliminary.

only under lend-lease arrangements. Since the end of lend-lease, the export demand for some foods has greatly decreased. However, loans to European countries and grants for relief may restore a considerable part of the export demand during 1946.

At least in the early months of 1946, supplies of some foods will continue to fall short of total demands. However, the quantity of food available to civilians in 1946 will be considerably greater than in 1945, principally because of cutbacks in military procurement. Even with increases in the civilian population resulting from the demobilization of armed forces, average food consumption in 1946 may exceed the 1944 record. Military food requirements in 1946 will appear to be only one-fourth to one-third of the 1945 takings. Exports and shipments of food in 1946 will continue large, assuming that satisfactory financial arrangements are completed. However, it does now appear that they will exceed 7 percent of the total disappearance of food in 1946, compared with 3 percent in 1935-39.